TRENDS

CONSUMER ATTITUDES &
THE SUPERMARKET 1991

FMI
FOOD MARKETING INSTITUTE

TRENDS 91

CONSUMER ATTITUDES & THE SUPERMARKET 1991

CONDUCTED FOR FOOD MARKETING INSTITUTE
BY OPINION RESEARCH CORPORATION

Price: $25.00 Members
$50.00 Nonmembers
Multiple copy discounts available

Copyrighted 1991
by Food Marketing Institute
Printed in U.S.A

Published by:

The Research Department
Food Marketing Institute
1750 K Street, N.W.
Washington, DC 20006

The Food Marketing Institute (FMI) is a nonprofit association conducting programs in research, education and public affairs on behalf of its 1,600 members—food retailers and wholesalers and their customers in the United States and around the world. FMI's domestic member companies operate approximately 19,000 retail food stores with a combined annual sales volume of $180 billion—more than half of all grocery sales in the United States. FMI's retail membership is composed of large multi-store chains, small regional firms and independent supermarkets. Its international membership includes more than 230 members from over 60 nations.

TRENDS 91

TABLE OF CONTENTS

INTRODUCTION 1
Study Design 1
A Note on the Tables 1

SURVEY HIGHLIGHTS 3

CHAPTER 1. HOW CONSUMERS VIEW THE SUPERMARKET 7
Expectations and Supermarket Performance 7
Overall Satisfaction With Supermarkets 12

CHAPTER 2. SPENDING AND SAVING MONEY 15
The Weekly Grocery Bill 15
Frequency of Using Money-Saving Measures 17
Methods of Economizing 22
Who Are the Heavy Economizers? 24

CHAPTER 3. SHOPPING PATTERNS 27
Switching Stores 27
Visits to Supermarket in an Average Week 29
Supermarkets and Takeout Food 31

CHAPTER 4. STORE PRODUCTS AND SERVICES 33
Availability 33
Using Store Products and Services 34
Potential Use of Store Products and Services 35

CHAPTER 5. CONSUMER ACTIVISM AND THE ENVIRONMENT 37
General Consumer Activism 37
Participation in Environmental Activities 38
Influence of Recycled Packaging on Product Purchases 40
Influence of Environmentally Safe Products and Practices on Supermarket Selection 42
Responsibility for Ensuring That Supermarkets Exhibit Environmentally Safe and Friendly Practices 43

CHAPTER 6. NUTRITION 45
Evaluation of Diet 45
Factors for Food Selection 48
Nutritional Content of Diet 50
Responsibility for Food Nutrition 54

CHAPTER 7. FOOD SAFETY 55
Factors for Food Selection 55
Confidence in the Food Supply 57
Responsibility for Food Safety 61

METHODOLOGY 63
Selection of the Sample 63
Sampling Error 63

TRENDS 91

INDEX OF TABLES

CHAPTER 1. HOW CONSUMERS VIEW THE SUPERMARKET

Table 1. How Well Supermarkets Meet Consumer Expectations: 1987-1991 8
Table 2. Importance of Supermarket Features, by Sex 9
Table 3. Importance of Supermarket Features, by Age 10
Table 4. Importance of Supermarket Features, by Household Size 11
Table 5. Consumers Evaluate Their Principal Supermarket: 1987-1991 12
Table 6. Consumers Evaluate Their Principal Supermarket: 1990-1991 13

CHAPTER 2. SPENDING AND SAVING MONEY

Table 7. Weekly Family Grocery Expenses: 1981-1991 15
Table 8. Weekly Family Grocery Expenses, by Size of Household: 1982-1991 16
Table 9. Average Per-Person Weekly Grocery Expenses: 1982-1991 16
Table 10. How Often Shoppers Economize, Use Supermarket Specials, Coupons and Price Comparisons: 1982-1991 17
Table 11. How Often Shoppers Economize Compared With One Year Ago 18
Table 12B. How Shopper Subgroups Vary in Their Use of Supermarket Specials, Coupons, and Price Comparisons, by Age and Size of Household 20
Table 12C. How Shopper Subgroups Vary in Their Use of Supermarket Specials, Coupons, and Price Comparisons, by Income and Education 21
Table 12C. How Shopper Subgroups Vary in Their Use of Supermarket Specials Coupons, and Price Comparisons, by Income and Education 21
Table 13. Money-Saving Behavior 22
Table 14. Consumers Current Areas of Economizing 24
Table 15. Profile of Heavy Economizers 25

CHAPTER 3. SHOPPING PATTERNS

Table 16. Switching Stores 27
Table 17. Reasons for Store Switching 28
Table 18. How Often Shoppers Go to the Supermarket in an Average Week: 1981-1991 29
Table 19. How Often Shoppers Go to the Supermarket in an Average Week 30
Table 20. Source of Takeout Food: 1986-1991 31
Table 21. Use of Supermarkets as Sources of Takeout Food 32

CHAPTER 4. STORE PRODUCTS AND SERVICES

Table 22. Availability of Store Products and Services 34
Table 23. Shoppers' Use of Store Products and Services 35
Table 24. Potential Use of Store Products and Services 36

CHAPTER 5. CONSUMER ACTIVISM AND THE ENVIRONMENT

Table 25. Actions Consumers Have Taken 37
Table 26. Actions That Consumers Are Willing to Take 38
Table 27. Consumer Participation in Environmental Activities at Home 39
Table 28. Likelihood of Purchasing Food and Nonfood Products in Recycled Packaging . . . 40
Table 29. Consumers Who Would Be More Likely to Purchase Products if the Package Is Made From Recycled Materials 41
Table 30. Likelihood of Switching to a Supermarket that Encourages Environmentally Safe Products and Practices 42
Table 31. Primary Responsibility for Ensuring That Supermarkets Exhibit Environmentally Safe and Friendly Practices 43

CHAPTER 6. NUTRITION

Table 32. Evaluation of Diet: 1989-1991 46
Table 33. Diet Behavior 47
Table 34. Importance of Various Factors in Food Selection 48
Table 35. Importance of Nutrition in Food Selection 49
Table 36. Level of Shoppers' Concern About the Nutritional Content of Foods: 1984-1991 . . 50
Table 37. Level of Shoppers' Concern About the Nutritional Content of Foods: 1990-1991 . . 51
Table 38. Nature of Shoppers' Concern About the Nutritional Content of Foods: 1984-1991 . 52
Table 39. Consumer Concern About Selected Nutrition-Related Attributes: 1984-1991 53
Table 40. Those on Whom Shoppers Rely to Ensure That the Products They Buy Are Nutritious 54

CHAPTER 7. FOOD SAFETY

Table 41. Importance of Product Safety in Food Selection: 1989-1991 56
Table 42. Consumer Confidence in Food Safety: 1989-1991 57
Table 43. Perceived Threats to Food Safety, by Sex and Education (Volunteered) 58
Table 44. Perceived Threats to Food Safety, by Region (Volunteered) 59
Table 45. Consumer Concern About Selected Food Attributes: 1985-1991 60
Table 46. Those on Whom Shoppers Rely to Ensure That the Products They Buy Are Safe . . 61

METHODOLOGY

Table 47. Demographic Profile of Supermarket Shoppers: 1991 (Unweighted) and 1990 (Weighted) 64
Table 48. Sampling Error (+/–) at 95 Percent Confidence Level for Samples of Eight Different Sizes 65
Table 49. Sampling Error of Differences Among Proportions 66

TRENDS 91

INTRODUCTION

This study is the twentieth in a series of consumer attitude surveys by the Food Marketing Institute. Designed to identify the changing needs and priorities of the American consumer, *Trends—Consumer Attitudes and the Supermarket, 1991* continues to explore core issues from previous years, while looking into new areas that are presently affecting shoppers and are likely to affect them in the future. The survey is conducted in January of each year.

The 1991 *Trends* continues to explore general shopping behavior, food safety and nutrition as in previous years. Wherever possible, comparisons are made with previous year's findings. Topics include:

- Expectations and evaluations of supermarket performance.
- Consumer expenditures in supermarkets and how shoppers try to save money.
- Frequency of trips to the supermarket, as well as store switching.
- Store products and services.
- Consumer attitudes toward nutrition and food safety.

In 1991, the survey revisited some economic and consumer issues addressed in *Trends* studies conducted in the early 1980s, including:

- Ways of economizing.
- Consumer activism and participation in consumer activities.

For the first time, the survey asked shoppers about environmental issues:

- Participation in recycling programs.
- The role of recycled packaging in buying decisions.
- Likelihood of switching to a supermarket that encourages environmentally safe products and services.
- Whom shoppers believe should be responsible for ensuring that products are environmentally safe and friendly.

In the methodology section of this report is a demographic profile of the total sample.

Study Design

The data for this survey are based on telephone interviews with a representative, nationwide sample of 1,004 male and female supermarket shoppers. The survey was conducted in January 1991.

Approximately half the interviews were completed prior to the beginning of the Persian Gulf War. In order to determine the effect, if any, of the war on responses to *Trends*, interviews completed prior to the beginning of the war (January 16, 1991) were compared with those completed during the war. Analysis of key questions and respondent demographics revealed no differences as a result of the timing of the interview.

In contrast to previous *Trends* surveys, data were *not* weighted to an 80 percent female and 20 percent male ratio. Rather, unweighted data are used throughout the report. By sex, the actual proportions are: 74 percent female and 26 percent male. To account for possible differences due to the change in methodology, responses on key items (e.g., consumer confidence) were compared separately for men and women. No significant differences were revealed as a result of this analysis.

A Note on the Tables

Directly beneath the title of each table is a description of the base — that is, the group of respondents for each question. The exact number of respondents in each base group, either in total or for shopper categories, is provided where appropriate. The percentages in each table are calculated using this

base number. These figures may not add up to 100 percent due to rounding or the acceptance of multiple responses. In all comparisons among categories surveyed in 1991, any noted differences are statistically significant. For year-to-year comparisons, whether for types of consumers or totals, changes are simply noted and are not subject to statistical comparison, unless otherwise noted.

For some tables, the response categories are presented both separately (e.g., very important, somewhat important) and combined (e.g., very important, or somewhat important). In some instances due to rounding, the separate percentages may not add up to the combined ones.

For each table the wording of the question appears as it was asked, and any changes in wording from previous years are noted.

TRENDS 91

SURVEY HIGHLIGHTS

The following is an overview of some of the most important findings of the January 1991 *Trends* study.

Expectations and Evaluations of Supermarket Performance

■ Shoppers continue to hold their supermarkets in high regard. The average rating is 7.9 on a scale of one to 10, where one means poor and 10 means excellent. This remains unchanged since 1988.

■ When selecting a supermarket, more than 95 percent of all shoppers place importance on quality produce; good variety or wide selection; good, low prices; and courteous and friendly employees. Of importance to at least nine in 10 are good quality meat, a convenient location, readable and accurate shelf tags and a fast checkout.

■ More than eight in 10 shoppers give their primary supermarket a rating of good or excellent for its convenient location, quality produce, good variety, courteous and friendly employees, and good quality meat. Only two out of three, however, rate their supermarket's performance as good or excellent on good, low prices (65 percent) or on fast checkout (67 percent). Shoppers' ratings of their supermarket's ability to provide good, low prices continued to decline, from 73 percent in 1987 to 65 percent in 1991.

Consumer Expenditures in Supermarkets and Methods of Economizing

■ Larger weekly grocery bills are consistent with a rise in consumer prices. From 1990 to 1991, the average bill increased from $74 to $79—the first significant increase since 1986, when it jumped from $68 to $74. The average per-person weekly expenditure also increased significantly, from $29 to $32.

■ Price is growing more important to shoppers. More 1991 than 1990 shoppers feel that price is very important when shopping (from 66 percent to 71 percent). The greater value shoppers place on price is in keeping with the increasing importance they place on their supermarket providing "items on sale or money-saving specials" (from 84 percent in 1989 to 88 percent in 1991). Better or lower prices also is mentioned more often as a reason for changing one's primary supermarket.

■ Price-off coupons (36 percent) and scanning the newspaper for grocery specials (33 percent) continue to be the most popular economizing methods used by shoppers pretty much every time they shop. However, the number of shoppers who look in the newspaper for specials pretty much every time they shop has been steadily declining—from 52 percent in 1983 to 38 percent in 1990 to 33 percent in 1991.

■ The money-saving measures that appear to be gaining ground include buying products on special, buying store or lower priced brands and stocking up on bargains. Fewer shoppers, however, make regular use of discount or warehouse food stores for grocery purchases.

■ More than half have been practicing a number of other economizing measures. These result in cost savings at the point of purchase, as well as more efficient use of items that have already been purchased. The most prevalent measures include making more use of price-off coupons (58 percent), doing more with leftovers (56 percent) and buying fewer luxury or gourmet items (55 percent).

■ "Heavy economizers" — those who practice at least five economizing measures—are likely to be women who do not work outside the home. This group tends to be younger and more affluent. They are typically from households of more than two persons that often include children. "Heavy economizers" spend an average of $80 per week on groceries; compared to the average of $79 for all shoppers. However, "heavy economizers" average lower per-person weekly expenditures than others ($29 versus $32).

Consumer Activism and the Environment

■ General consumer activism is widespread. In 1991, 84 percent of the shopping public already have refused to buy products that cost too much. This is a marked increase over the 72 percent who had done so in 1984. Nearly half of all shoppers (47 percent) have refused to buy products manufactured by companies whose policies they disagree with. More than one-third have refused to buy products where the ethical treatment of animals has been called into question (38 percent), and another 30 percent have refused to buy products because of environmental concerns — unnecessary or unrecyclable packaging. Only about one in eight shoppers, however, has gone so far as to join an organized boycott against particular products or stores.

■ Shoppers are doing much to protect the environment, especially by recycling: The most recycle aluminum (74 percent), followed by newspapers (64 percent), plastics (48 percent) and glass (44 percent).

■ Food and nonfood product packaging made from recycled materials generally is attractive to shoppers. Approximately six out of 10 shoppers say they would be at least a little more likely to buy a product if the label said that the package was made from recycled materials. However, one-third say that they would not be influenced by the label at all. The type of product makes some difference to shoppers; 9 percent say that they would be less likely to buy a food product in recycled packaging, whereas only 5 percent of consumers would be less likely to buy a nonfood product sold in a package made from recycled materials.

■ Environmental concerns have some impact on shopper's selection of a primary supermarket. All other things being equal, as many as 57 percent of all shoppers probably or definitely would change supermarkets if a new store opened nearby that promoted environmentally safe products and practices.

■ Shoppers rely primarily on manufacturers to ensure that the food and nonfood products they buy in their supermarket are environmentally safe and friendly (37 percent). Another one out of four relies on the government (24 percent) and about one in 10 relies on themselves (12 percent), retailers or consumer organizations (9 percent each).

Nutrition

■ More than two out of three shoppers feel that their diets could be improved (69 percent), while only one in 10 are satisfied that their diet is as healthy as it could be. Eating more fruits and vegetables is the action that shoppers most commonly take to ensure the healthfulness of their diet (57 percent). Shoppers also eat less red meat (34 percent) and less fats and oils (25 percent) to keep their diet healthy.

■ The proportion of shoppers who are eating more fish has dropped significantly over the past year (from 18 percent to 14 percent), as has the number of shoppers who are eating less salt (from 15 percent to 10 percent). The declining appeal of fish is consistent with the lower importance of a fresh seafood section when selecting a supermarket (from 63 percent to 60 percent). Fewer shoppers report that they are eating less fried foods as well (7 percent versus 14 percent in 1990).

■ Nutrition is second only to taste as the factor of greatest importance to individuals when shopping for food. Almost all shoppers feel that it is somewhat or very important (97 percent).

■ Nutritional concerns are widespread. More than half of all shoppers are very concerned about the nutritional content of the foods they eat (56 percent). Shoppers express the most concern about fat (42 percent), cholesterol (37 percent) and salt (22 percent). After seven straight years of steadily increasing concern over fat and cholesterol, the reported level of concern over both factors dropped in 1991. In addition, fewer consumers in 1991 than 1990 expressed concern about salt content.

Fats and cholesterol continue to be identified by shoppers as the most serious health hazards. In fact, significantly more shoppers in 1991 than 1990 rate fats (62 percent vs. 54 percent in 1990) and cholesterol (58 percent vs. 47 percent in 1990) as serious health hazards. Current year perceptions are on a par with those reported in 1989. Shoppers' perceptions of the hazardous nature of salt (32 percent) and sugar in food (18 percent) have not changed over the past year, after a decline for each of these items from 1989 to 1990.

■ More consumers rely upon themselves than on any other source to ensure that the food they buy is nutritious (38 percent). Compared with last year, shoppers place increased responsibility with

manufacturers (26 percent, from 21 percent in 1990) and less with government (17 percent, from 23 percent in 1990). Fewer than one in 10 shoppers continues to place responsibility with the retailer.

Consumer Attitudes Toward Food Safety

■ Product safety remains a somewhat or very important concern to nine in 10 shoppers (90 percent). Shopper confidence in the safety of the food at their supermarket is at a new high — 82 percent, up one point since 1990, and up dramatically over the confidence rating of 65 percent reported in mid-1989.

■ Although declining in prominence over the past three years, "spoilage" is most frequently volunteered by shoppers as a threat to food safety (27 percent) followed by "pesticides, residues, insecticides and herbicides" (20 percent), "improper packaging or canning" (17 percent) and "chemicals" (15 percent). The threat of "tampering" is significantly below that reported a year ago (8 percent vs. 14 percent in 1990), and may be a result of the fact that no tampering incidents received public attention close to the time of the 1991 *Trends* interviews—which preceded the Sudafed tampering.

■ When asked how much various chemicals and processes may pose health hazards, "residues, such as pesticides and herbicides" is rated as the single most serious health hazard (80 percent). "Antibiotics and hormones in poultry and livestock" is called a serious hazard by nearly three out of five shoppers (56 percent). These perceptions have held steady over the past year.

■ Shoppers are most likely to rely on themselves to ensure the safety of food they buy (39 percent). About half as many rely on the government (23 percent) or manufacturers (19 percent). Shopper reliance on the government has declined by four percentage points over the past year. At the same time, shoppers are taking increasing responsibility themselves (up four percentage points since 1990). Fewer than one out of 10 continue to rely on retailers to ensure food safety.

Shopping Habits and Behavior

■ Shoppers average 2.3 visits to the supermarket each week.

■ The vast majority remain loyal to their primary supermarket. The proportion who switched primary supermarkets over the past year has declined from 29 percent in 1989 to 24 percent in 1991. The two primary reasons: a more convenient location or better prices (44 percent each). Price is increasing in importance as a reason for switching stores, from 37 percent in 1989 to 44 percent in 1991.

■ More than one shopper in 10 continues to use the supermarket as their primary source of takeout food (14 percent). Fast-food restaurants continue to grow as a source of takeout food, (from 41 percent in 1988 to 51 percent in 1991), while restaurants continue the decline first noted in 1989 (from 38 percent in 1988 to 23 percent in 1991).

Store Products and Services

■ Three products and services are now available to nearly all shoppers in their supermarkets: food products designed especially for microwave cooking (94 percent); private label or store brands (94 percent); and deli or other carryout food items (87 percent). Deli or other carryout foods are more widely available today than a year ago (up seven percentage points). Gourmet or specialty foods (70 percent) and a floral department (69 percent) also are available to more than two out of three shoppers. Gourmet food items are available to 14 percent more shoppers in 1991 than in 1990, and are now more widely available than they have been since 1988 (74 percent). The reported availability of a salad bar (48 percent) and a prescription drug counter (36 percent) also have increased. Only for unpackaged or bulk food has reported availability declined (51 percent).

■ The products or services used most frequently by shoppers: private label or store brands (44 percent); deli or other carryout foods (25 percent); food products designed especially for microwave cooking (25 percent); and unpackaged or bulk food (21 percent). Since 1990, more shoppers have made more frequent use of private label or store brands.

■ For shoppers who do not have products and services available to them, the items with the greatest potential usage include deli or other carryout foods (19 percent), postage stamps (16 percent) and unpackaged or bulk food (12 percent).

CHAPTER 1

HOW CONSUMERS VIEW THE SUPERMARKET

EXPECATIONS AND SUPERMARKET PERFORMANCE

For the fifth consecutive year, in 1991 the *Trends* survey asked shoppers how important various factors were in selecting a supermarket (see Table 1). Shoppers continue to exhibit consistency in the foremost factors, and the order of the top three has not changed since last year: "Quality produce (fruits and vegetables)" ranks in the top position; "good variety or wide selection" ranks second; and "good, low prices" is tied with "courteous and friendly employees" for third. "Good quality meat" slipped to fourth place.

Three of the top five features relate to product offerings; the remaining two pertain to store services and features. The other three features important to at least nine out of 10 shoppers concern services and features: convenient location, readable and accurate shelf tags, and fast checkout. Nearly as many shoppers value two additional features: items on sale or money-saving specials, and having nutrition and health information for shoppers.

Of the remaining features, more than two in three shoppers rated as somewhat or very important a convenient store layout, fresh food sections like a deli or bakery, and environmental programs.

No more than three in five shoppers rated the remaining four features as at least somewhat important: fresh seafood section, private label or store brands, 24-hour operation, and a pharmacy.

Importance ratings remain relatively unchanged from prior years with three exceptions:

1. Shoppers apparently are more cost conscious. The percentage who place importance on "items on sale or money-saving specials" increased by three points—from 85 percent in 1990 to 88 percent in 1991. This is not unexpected given the sluggish economy.

2. A fresh seafood section is rated as important by only 60 percent of shoppers, down three points from the 1990 rating.

3. While not significantly higher than in 1990, the proportion of shoppers who value nutrition and health information is up to 86 percent, from 75 percent in 1987.

TABLE 1

HOW WELL SUPERMARKETS MEET CONSUMER EXPECTATIONS: 1987-1991

Q: *In the next series of questions, I'm going to read a list of factors that may or may not be important when a person decides where to shop for food. For each factor, please tell me if it is very important, somewhat important, not too important or not at all important to you when you select a primary food store.*

Q: *Now I'm going to read the same list of factors, and ask you to tell me how well the supermarket in which you usually shop does on each one. For each factor, please tell me whether your supermarket does an excellent, good, fair or poor job of having (READ EACH ITEM).*

Base: The shopping public

		Very or Somewhat Important					Excellent or Good Rating				
		1987	1988	1989	1990	**1991**	1987	1988	1989	1990	**1991**
Quality produce (fruits and vegetables)	%	98	98	98	98	**99**	85	85	85	88	**88**
Good variety or wide selection	%	96	96	96	97	**98**	88	87	86	89	**87**
Good, low prices	%	93	94	92	96	**96**	73	72	71	66	**65**
Courteous, friendly employees	%	93	93	94	94	**96**	87	87	85	87	**87**
Good/quality meat	%	96	94	95	96	**95**	82	85	84	86	**83**
Convenient location	%	92	92	91	92	**93**	87	88	89	88	**90**
Readable and accurate shelf tags	%	90	92	92	92	**91**	73	70	72	70	**72**
Fast checkout	%	89	88	88	89	**91**	70	70	71	69	**67**
Items on sale or money-saving specials	%	85	86	84	85	**88**	78	79	77	77	**78**
Nutrition and health information available for shoppers*	%	75	74	84	84	**86**	50	50	55	75	**71**
Convenient store layout	%	79	78	76	77	**79**	83	85	83	83	**83**
Fresh food sections like a deli or bakery**	%	72	76	76	72	**73**	75	77	81	87	**88**
Environmental programs	%	X	X	X	X	**72**	X	X	X	X	**76**
Fresh seafood section*	%	X	X	X	63	**60**	X	X	X	75	**74**
Private label/store brands*	%	X	X	X	54	**55**	X	X	X	74	**73**
24-hour operation*	%	X	X	X	45	**45**	X	X	X	X	**X**
Pharmacy*	%	X	X	X	37	**37**	X	X	X	58	**66**

X = Not asked.

* In 1990 and 1991, supermarket's performance asked only of those whose supermarket has the specified feature. In earlier years, these items were asked of all respondents.

** In 1987, shoppers were asked to rate "specialty sections like a deli, bakery or fresh fish." In 1988 and 1989, shoppers were asked to rate "specialty food sections like a deli, bakery or fresh fish."

When comparing shoppers by sex, men and women generally place comparable value on the same features when choosing a supermarket. As shown in Table 2, men and women differ significantly with respect to the importance they place on five features. Each of these is relatively more important to women than to men.

- Good, low prices.
- Items on sale or money-saving specials.
- Nutrition and health information available for shoppers.
- Convenient store layout.
- Private label or store brands.

Two additional differences are evident between men and women who work outside the home. Working women attach greater importance to a convenient location and environmental programs than men.

TABLE 2

IMPORTANCE OF SUPERMARKET FEATURES, BY SEX

Q: *In the next series of questions, I'm going to read a list of factors that may or may not be important when a person decides where to shop for food. For each factor, please tell me if it is very important, somewhat important, not too important or not at all important to you when you select a primary food store.*

Base: The shopping public

		Jan. 1991 Total	Men	Women		
				Total	Working	Nonworking
Base		**1,004**	263	741	411	327
Very or Somewhat Important						
Quality produce (fruits and vegetables)	%	**99**	97	99	99	99
Good variety or wide selection	%	**98**	97	99	99	99
Good, low prices	%	**96**	93	97	97	98
Courteous, friendly employees	%	**96**	94	97	96	97
Good/quality meat	%	**95**	95	95	94	96
Convenient location	%	**93**	90	94	95	94
Readable and accurate shelf tags	%	**91**	88	92	92	92
Fast checkout	%	**91**	89	91	93	89
Items on sale, or money-saving specials	%	**88**	80	91	90	93
Nutrition and health information available for shoppers	%	**86**	81	88	86	90
Convenient store layout	%	**79**	72	81	81	82
Fresh food sections like a deli or bakery	%	**73**	71	74	74	75
Environmental programs	%	**72**	67	73	75	72
Fresh seafood section	%	**60**	59	61	59	62
Private label/store brands	%	**55**	46	58	55	62
24-hour operation	%	**45**	46	45	47	42
Pharmacy in store	%	**37**	37	37	35	40

Examining importance by age, few consistent patterns emerge (see Table 3). Shoppers aged 65 or older differ somewhat from younger shoppers. Older shoppers place less emphasis on three store services and features than do others: fast checkout; fresh food sections like a deli or bakery; and environmental programs. Along with 50-64 year olds, the oldest shoppers place relatively greater importance on private label and store brands than do those under the age of 50.

Shoppers aged 18 to 24 also stand out, valuing two "convenience" factors as at least somewhat important: 24-hour operation and an in-store pharmacy. Conversely, they are less likely to regard readable and accurate shelf tags as important.

By size of household, some differences are apparent (Table 4). Fewer shoppers in one-person households place importance on readable and accurate shelf tags, environmental programs or an in-store pharmacy. One- and two-person households appear less concerned about economics, compared with households of three or more. Shoppers from the smaller households less often rate items on sale or money-saving specials as at least somewhat important.

Shoppers in households with more than two persons attach greater importance to 24-hour operations than do others. Shoppers from the largest households — five or more persons — rate a convenient store layout as less important than others when selecting a primary food store.

Since 1987, *Trends* has investigated the extent to which supermarkets meet shoppers' needs. In 1991, shoppers were presented with the same list of features rated for importance (see Table 1) and asked to rate their supermarket's performance on each. As has been the case in prior years, supermarket performance ratings typically fall below importance ratings. Despite the low-

TABLE 3

IMPORTANCE OF SUPERMARKET FEATURES, BY AGE

Q: *In the next series of questions, I'm going to read a list of factors that may or may not be important when a person decides where to shop for food. For each factor, please tell me if it is very important, somewhat important, not too important or not at all important to you when you select a primary food store.*

Base: The shopping public

		Jan. 1991 Total	Age				
			18-24	25-39	40-49	50-64	65 +
Base		**1,004**	77	348	212	220	124
Very or Somewhat Important							
Quality produce (fruits and vegetables)	%	**99**	94	99	99	99	100
Good variety or wide selection	%	**98**	95	99	98	100	97
Good, low prices	%	**96**	96	97	93	98	97
Courteous, friendly employees	%	**96**	92	95	96	99	96
Good/quality meat	%	**95**	94	93	96	97	98
Convenient location	%	**93**	95	94	92	93	91
Readable and accurate shelf tags	%	**91**	83	91	87	95	93
Fast checkout	%	**91**	87	93	92	91	82
Items on sale, or money-saving specials	%	**88**	87	88	86	90	90
Nutrition and health information available for shoppers	%	**86**	82	84	87	89	89
Convenient store layout	%	**79**	74	76	80	83	83
Fresh food sections like a deli or bakery	%	**73**	84	76	70	73	65
Environmental programs	%	**72**	74	73	75	75	59
Fresh seafood section	%	**60**	58	57	60	66	60
Private label/store brands	%	**55**	49	51	53	63	62
24-hour operation	%	**45**	66	51	45	38	28
Pharmacy in store	%	**37**	58	37	34	36	32

er overall performance ratings, at least four shoppers out of five rate their supermarket good or excellent on seven features:

- Convenient location (90 percent).*
- Quality produce (88 percent).*
- Fresh food sections like a deli or bakery (88 percent).
- Good variety or wide selection (87 percent).*
- Courteous, friendly employees (87 percent).*
- Good quality meat (83 percent).*
- Convenient store layout (83 percent).

With the exception of "good, low prices," each of the five features most highly ranked for importance also is rated highly on performance. In fact, the supermarket's performance on "good, low prices" falls well short of its importance rating (65 percent versus 96 percent for importance). Notably, at a time when "good, low prices" is of increasing importance, supermarket's performance ratings on this measure are declining. The proportion who rate their supermarket as doing a good or excellent job of providing "good, low prices" declined from 73 percent in 1987 to 65 percent in 1991.

The importance shoppers place on supermarket factors exceeds the supermarket's actual performance for each of the 10 most important features, while the reverse holds true for the seven least important features.

Supermarket performance ratings have remained relatively consistent over the past year with one exception. Larger proportions of 1991 than 1990 shoppers rate their supermarket's performance as good or excellent in one department — the in-store pharmacy. Pharmacy performance has improved more than any other single factor.

TABLE 4

IMPORTANCE OF SUPERMARKET FEATURES, BY HOUSEHOLD SIZE

Q: *In the next series of questions, I'm going to read a list of factors that may or may not be important when a person decides where to shop for food. For each factor, please tell me if it is very important, somewhat important, not too important or not at all important to you when you select a primary food store.*

Base: The shopping public

		Jan. 1991 Total	Household Size			
			One	Two	Three To Four	Five Or More
Base		**1,004**	173	342	389	95
Very or Somewhat Important						
Quality produce (fruits and vegetables)	%	**99**	99	99	99	97
Good variety or wide selection	%	**98**	97	99	99	98
Good, low prices	%	**96**	95	97	96	97
Courteous, friendly employees	%	**96**	96	97	96	94
Good/quality meat	%	**95**	94	95	95	9
Convenient location	%	**93**	93	92	95	87
Readable and accurate shelf tags	%	**91**	86	92	92	91
Fast checkout	%	**91**	90	88	93	90
Items on sale, or money-saving specials	%	**88**	84	85	92	93
Nutrition and health information available for shoppers	%	**86**	84	85	87	90
Convenient store layout	%	**79**	78	80	80	73
Fresh food sections like a deli or bakery	%	**73**	70	68	80	67
Environmental programs	%	**72**	64	70	76	74
Fresh seafood section	%	**60**	57	64	59	54
Private label/store brands	%	**55**	51	53	59	54
24-hour operation	%	**45**	36	39	53	51
Pharmacy in store	%	**37**	29	35	41	40

*Among the top five in importance when selecting a supermarket

Overall Satisfaction With Supermarkets

For the fifth consecutive year the 1991 *Trends* examined shoppers' level of satisfaction with their primary supermarket. To obtain this measure, shoppers were asked to rate their principal supermarket on a scale of one to 10, where "one" indicates their supermarket is doing a poor job and "10" indicates their supermarket is doing an excellent job. Consumers remain highly satisfied with the job their supermarket is doing. The mean rating of 7.9 has been maintained since 1988 (see Table 5). The percentage of shoppers who rate their supermarket "nine" or "10" has increased to 32 percent, reversing the three-point decline noted in 1990. The increase in individuals who rate their supermarket a "nine" or "10" is widespread and crosses nearly all demographic segments.

Population subgroups differ somewhat in their overall level of satisfaction with their supermarket (Tables 5, 6). The most important differences:

- Men are less satisfied overall than are women, particularly women who do not work outside the home.
- The proportion of shoppers who rate their supermarket a "nine" or "10" increases with age. Nearly half of shoppers aged 65 or older give their supermarket the two highest ratings, compared with only 20 percent of those aged 18 to 24.
- Shoppers with household incomes of $25,000 or less are more satisfied with the job their supermarket is doing than those who live in households with incomes greater than $25,000.
- Shoppers with no college education are more likely to rate their supermarket highly on overall performance than are those with at least some college education.

TABLE 5

CONSUMERS EVALUATE THEIR PRINCIPAL SUPERMARKET: 1987-1991

Q: *All things considered, how satisfied are you with the job the supermarket in which you usually shop is doing with respect to meeting your grocery shopping needs? Please use a scale of one to ten, where "one" means they are doing a poor job and "ten" means they are doing an excellent job. Use any number between and including one to ten.*

Base: The shopping public

	Average Rating (1 to 10 Scale)					Percent Rating Supermarket 9 or 10				
	1987	1988	1989	1990	**1991**	1987	1988	1989	1990	**1991**
					%	%	%	%	%	
Total	7.8	7.9	7.9	7.9	**7.9**	31	32	32	29	**32**
Sex										
Men	7.6	7.7	7.7	7.7	**7.7**	24	29	25	22	**24**
Women	7.9	7.9	7.9	7.9	**8.1**	32	32	33	31	**35**
Working	7.7	7.7	7.9	7.8	**8.0**	26	26	31	28	**31**
Nonworking	8.1	8.2	7.9	8.1	**8.1**	38	41	36	35	**38**
Type of household										
With children	7.7	7.8	7.8	7.7	**7.9**	26	29	30	24	**29**
No children	8.0	8.0	8.0	8.0	**8.0**	35	34	33	33	**33**
Size of Household*										
1	8.1	8.1	8.0	8.1	**7.8**	40	40	38	37	**33**
2	7.9	7.9	8.0	8.0	**8.0**	33	30	31	33	**34**
3	7.8	7.9	7.8	7.8	**N/A**	26	30	32	26	**N/A**
4	7.7	8.0	7.7	7.7	**7.9**	30	36	29	23	**29**
5 or more	7.9	7.5	7.8	7.7	**8.0**	26	23	31	25	**35**
Age										
18-24	7.3	7.9	7.7	7.8	**7.6**	16	23	21	28	**20**
25-39	7.6	7.8	7.8	7.7	**7.8**	21	28	27	21	**26**
40-49	7.9	7.6	7.8	7.8	**8.0**	34	27	35	27	**33**
50-64	8.2	8.1	8.0	8.1	**8.1**	40	36	35	38	**35**
65 and older	8.3	8.3	8.2	8.3	**8.3**	52	51	43	43	**47**

* In 1991, the household sizes of three and four persons are combined.

TABLE

6

CONSUMERS EVALUATE THEIR PRINCIPAL SUPERMARKET: 1990-1991

Q: *All things considered, how satisfied are you with the job the supermarket in which you usually shop is doing with respect to meeting your grocery shopping needs? Please use a scale of one to ten, where "one" means they are doing a poor job and "ten" means they are doing an excellent job. Use any number between and including one to ten.*

Base: The shopping public

	Average Rating (1 to 10 scale)		Percentage Rating Supermarket 9 or 10	
	1990	**1991**	1990	**1991**
			%	%
Total	7.9	**7.9**	29	**32**
Income				
$15,000 or less	8.0	**8.0**	39	**42**
$15,001-$25,000	7.9	**8.1**	29	**35**
$25,001-$35,000	7.7	**7.9**	24	**29**
$35,001-$50,000	7.9	**7.3**	23	**25**
$50,001 or more	7.7	**7.8**	25	**25**
Education				
High school or less	8.0	**8.1**	36	**37**
Some college/college graduate	7.7	**7.8**	21	**27**

CHAPTER 2

SPENDING AND SAVING MONEY

THE WEEKLY GROCERY BILL

From January 1990 to January 1991, average weekly grocery expenses increased to $79, after holding steady at $74 from 1989 to 1990. This represents the first significant increase in weekly grocery expenditures since 1986, when average weekly expenditures rose from $68 to $74. The current increase in average expenditures reflects the somewhat smaller proportion of shoppers who spend up to $60 per week and the greater number who spend more than $100 (see Table 7).

TABLE 7

WEEKLY FAMILY GROCERY EXPENSES: 1981-1991

Q: *About how much do you spend each week on groceries for your family?*

Base: The shopping public

		Total										
		Jan. 1981	Jan. 1982	Jan. 1983	Jan. 1984	Jan. 1985	Jan. 1986	Jan. 1987	Jan. 1988	Jan. 1989	Jan. 1990	**Jan. 1991**
$0-$40	%	29	30	28	23	23	19	21	23	21	21	**19**
$41-$60	%	29	25	29	29	27	28	26	25	24	24	**22**
$61-$100	%	31	30	33	34	34	38	37	38	37	39	**39**
$101 and over	%	6	8	9	9	12	13	12	11	14	13	**17**
Not sure/ no answer/refused	%	N/A	7	1	4	4	3	3	3	5	3	**2**
Average weekly grocery expenses		$55	$58	$62	$64	$68	$74	$72	$71	$74	$74	**$79**

N/A = Not available in 1981.

May not add to 100 percent due to rounding.

Weekly family grocery expenditures increased for families of all sizes (Table 8). However, only the bills for two-person households increased significantly over the past year, from $63 to $71.

Per person weekly grocery expenditures also increased by a significant amount over the past year. Shoppers now spend an average of $32 per person weekly, compared with $29 per week reported in 1989 and 1990 (see Table 9). Per person expenditures are up slightly for all demographic subgroups. Households without children continue to spend more than do those with children and; consequently, larger households tend to spend less per person.

TABLE 8

WEEKLY FAMILY GROCERY EXPENSES, BY SIZE OF HOUSEHOLD: 1982-1991

Q: *About how much do you spend each week on groceries for your family?*

Base: The shopping public

	Total									
	Jan. 1982	Jan. 1983	Jan. 1984	Jan. 1985	Jan. 1986	Jan. 1987	Jan. 1988	Jan. 1989	Jan. 1990	**Jan. 1991**
	$	$	$	$	$	$	$	$	$	**$**
Size of household										
1	33	36	40	40	41	33	38	40	39	**43**
2	51	54	59	58	62	58	61	63	63	**71**
3	70*	72*	71	76	76	77	74	80	82	**92***
4	70*	72*	80	85	84	85	88	90	91	**92***
5 or more	90	85	82	92	103	104	98	109	103	**111**

* Expenses for 1982, 1983 and 1991 are combined for three- and four-person households.

TABLE 9

WERAGE PER-PERSON WEEKLY GROCERY EXPENSES: 1982-1991*

Base: The shopping public

	Total									
	Jan. 1982	Jan. 1983	Jan. 1984	Jan. 1985	Jan. 1986	Jan. 1987	Jan. 1988	Jan. 1989	Jan. 1990	**Jan. 1991**
	$	$	$	$	$	$	$	$	$	**$**
Total	21	22	23	24	27	24	26	29	29	**32**
Married										
One spouse at home	20	20	22	23	25	23	24	26	26	**28**
Two wage-earners	22	22	23	23	26	25	25	26	28	**31**
Type of Household										
With children	19	19	19	21	21	21	22	23	22	**26**
No children	25	28	28	29	32	28	31	33	34	**36**
Size of Household										
1	33	36	40	40	41	33	38	40	39	**43**
2	26	27	29	29	31	27	29	31	32	**35**
3-4	20	21	22	23	23	23	23	25	25	**27**
5 or more	17	16	15	17	19	17	17	19	18	**20**
Region										
East	23	22	23	25	28	25	26	30	33	**36**
Midwest	20	20	22	21	25	22	25	26	26	**28**
South	20	24	23	24	26	25	26	28	28	**31**
West	23	24	24	26	27	24	29	31	28	**35**

* Calculated from average weekly grocery expenses and household size. Where respondents couldn't provide data, they were omitted from the calculation.

Frequency of Using Money-Saving Measures

Notwithstanding a recession and larger grocery bills, consumers in 1991 did not become more aggressive bargain-hunters and even curtailed their use of the most popular measure — checking newspapers for specials. The portion who scan newspapers "pretty much every time" they shop dropped from 38 percent in 1990 to 33 percent in 1991. Over half the shoppers used this method as recently as 1983 (see Table 10).

Beginning in 1982, shoppers were asked how often they economize by using supermarket specials, coupons and price comparisons. In 1991, *Trends* also asked shoppers how often they stock up when they find a bargain, buy products on special, buy store brands or lower priced products, and shop at a discount or warehouse food store. Using price-off coupons and checking newspapers for grocery specials continue to be the most common methods (see Table 10). Stocking up on bargains and price comparisons are the next most prevalent economizing behaviors.

Despite increases in consumer prices and average weekly grocery bills, shoppers are significantly less likely to look in the newspaper for specials or compare prices at different supermarkets than they were in 1990 (Table 10). In fact, the number of shoppers who report looking in the newspaper for grocery specials pretty much every time they shop has been steadily declining since 1983, when 52 percent of all shoppers reported using this method of economizing. Comparing prices at different supermarkets also is less prevalent today than 10 years ago. Only one in five 1991 shoppers economizes by comparing prices at more than one store; one in three shoppers did so in 1982.

TABLE 10

HOW OFTEN SHOPPERS ECONOMIZE, USE SUPERMARKET SPECIALS, COUPONS AND PRICE COMPARISONS: 1982-1991

Q: *How often do you (READ EACH ITEM) — pretty much every time you shop, fairly often, only occasionally, or never?*

Base: The shopping public

		Pretty Much Every Time You Shop									1991				
		1982	1983	1984	1985	1986	1987	1988	1989	1990	**Pretty Much Every Time**	Fairly Often	Only Occasionally	Never	Not Sure
Use price-off coupons	%	39	38	39	30	39	37	40	35	37	**36**	22	29	13	*
Look in the newspaper for grocery specials	%	50	52	49	41	40	**	42	34	38	**33**	21	23	24	*
Stock up on an item when you find a bargain	%	X	X	X	X	X	X	X	X	X	**24**	28	37	11	*
Compare prices at different supermarkets	%	32	30	29	27	25	23	26	23	24	**20**	20	33	26	*
Buy store brands or lower priced products instead of national brands	%	X	X	X	X	X	X	X	X	X	**18**	28	42	12	1
Buy products on special even if you hadn't planned to buy them that day	%	X	X	X	X	X	X	X	X	X	**17**	30	42	11	*
Go to supermarkets other than your principal one for advertised specials	%	16	13	12	10	9	12	12	12	10	**9**	14	45	33	*
Shop at a discount or warehouse food store for grocery items	%	X	X	X	X	X	X	X	X	X	**5**	11	41	43	*

X = Not asked.

* Less than 0.5 percent.

** Not reported due to data anomoly.

Shoppers report little change in their frequency of buying products on special or store brands, stocking up on bargains, and shopping at a discount or warehouse food store is comparable to what shoppers recall doing a year ago (Table 11). However, at least one in five shoppers either say they are buying store brands, lower priced products or products on special even if they hadn't planned to more often than they did last year. About one in five shoppers go to a discount or warehouse food store for grocery items less often than they did a year ago.

TABLE 11

HOW OFTEN SHOPPERS ECONOMIZE COMPARED WITH ONE YEAR AGO

Q: *Now I'd like you to think of your shopping habits over the past year. For each of the following items, please tell me whether you do it more often, less often, or about the same amount that you did a year ago.*

Base: The shopping public

	Frequency of Activity			
	More	Less	Same	Don't Know
Buy products on special even if you hadn't planned to buy them that day	23%	13	64	1
Buy store brands or lower priced products instead of national brands	21%	12	66	1
Stock up on an item when you find a bargain	18%	10	71	1
Shop at a discount or warehouse food store for grocery items	12%	22	64	2

Demographic differences in economizing behavior are widespread. Nonworking women use economizing measures more frequently than do men, and in some cases more frequently than do working women (Table 12A). Older shoppers and those in larger households also use money-saving measures more (Table 12B). Economizing is more prevalent among those with lower incomes or less formal education (Table 12C). In contrast to these groups, shoppers in the Western U.S. are less conscious of economizing than are those in other regions (Table 12A). These and other differences are detailed below.

Use Price-Off Coupons

■ Women are more likely than men to use price-off coupons (Table 12A).

■ Shoppers in the East are most likely to use coupons, while those in the West are least likely to do so (Table 12A).

■ The use of price-off coupons increases with household size. Coupon use among households of five or more is nearly twice that for one-person homes (Table 12B).

■ Shoppers without some college education more frequently use coupons than the college-educated (Table 12C).

Look in Newspaper for Grocery Specials

■ Nonworking women read the newspaper for grocery specials more often than do working women and men (Table 12A).

■ Westerners are less likely than those in the East and Midwest to scan the newspaper for grocery specials (Table 12A).

■ Shoppers aged 65 or older are more likely than others to use this method of economizing. Shoppers under age 40 are least likely to do so (Table 12B).

■ Shoppers from households of five or more persons look for grocery specials with greater frequency than do those in smaller households. One-person households do so least often (Table 12B).

■ As household incomes decline, shoppers more often look for grocery specials in the newspaper. Households earning less than $15,000 are particularly likely to do so (Table 12C).

■ The high school-educated look through the newspaper for grocery specials with greater frequency than do those with a college education (Table 12C).

TABLE 12A

HOW SHOPPER SUBGROUPS VARY IN THEIR USE OF SUPERMARKET SPECIALS, COUPONS AND PRICE COMPARISONS, BY SEX AND REGION

Q: *How often do you (READ EACH ITEM) — pretty much every time you shop, fairly often, only occasionally, or never?*

Base: The shopping public

		Sex				Region			
			Women						
	Total	Men	Total	Working	Non-Working	East	Midwest	South	West
	%	%	%	%	%	%	%	%	%
Base	1,004	263	741	411	327	240	290	317	157
Pretty Much Every Time									
Use price-off coupons	36	25	40	40	40	42	38	37	24
Look in newspaper for grocery specials	33	25	36	31	43	35	39	31	26
Stock up when you find a bargain	24	18	27	24	31	25	23	26	22
Compare prices at different supermarkets	20	18	21	18	25	24	20	20	18
Buy store/lower priced brands instead of national brands	18	17	18	18	19	16	16	22	15
Buy products on special even if you hadn't planned to	17	11	19	19	19	18	15	18	15
Go to supermarkets other than your principal one for advertised specials	9	10	9	7	11	10	10	9	6
Shop at a discount or warehouse store for grocery items	5	3	6	6	6	3	8	4	7

Stock Up When You Find a Bargain

■ Nonworking women stock up with greater frequency than either men or working women (Table 12A).

■ Shoppers younger than 25 stock up less often than older shoppers (Table 12B).

■ Shoppers from one-person households do so less often than shoppers from larger households (Table 12B).

■ Shoppers with a high school education or less stock up on bargains more often than the college-educated (Table 12C).

Compare Prices at Different Supermarkets

■ Nonworking women are more likely to compare prices than men or working women (Table 12A).

■ Shoppers under age 25 are far less likely than are older ones to make price comparisons (Table 12B).

■ The frequency of this activity declines as household income rises. Comparing prices at different supermarkets is practiced more frequently among shoppers whose household income is less than $15,000 (Table 12C).

■ Shoppers with a high school degree or less more often compare prices at different supermarkets than do college-educated shoppers (Table 12C).

Buy Store or Lower-Priced Brands Instead of National Brands

■ Shoppers in the South are the most likely to buy store or lower-priced brands (Table 12A).

■ Shoppers under age 40 practice this measure more often than older shoppers (Table 12B).

■ Shoppers from households of at least five persons economize by buying lower-priced brands much more frequently than shoppers from smaller households (Table 12B).

■ Purchases of lower-priced or store brands decline as household income rises, and are greatest among shoppers with household incomes of $25,000 or less (Table 12C).

TABLE

12B

HOW SHOPPER SUBGROUPS VARY IN THEIR USE OF SUPERMARKET SPECIALS, COUPONS AND PRICE COMPARISONS, BY AGE AND SIZE OF HOUSEHOLD

Q: *How often do you (READ EACH ITEM) — pretty much every time you shop, fairly often, only occasionally, or never?*

Base: The shopping public

		Age					Size of Household			
	Total	18-24	25-39	40-49	50-64	65 And Over	1	2	3-4	5+
	%	%	%	%	%	%	%	%	%	%
Base	1,004	77	348	212	220	124	173	342	389	93
Pretty Much Every Time										
Use price-off coupons	36	33	34	41	36	40	25	34	40	47
Look in newspaper for grocery specials	33	25	25	36	38	48	25	33	34	43
Stock up when you find a bargain	24	17	24	25	28	26	17	26	26	28
Compare prices at different supermarkets	20	9	19	22	21	29	20	18	22	25
Buy store/lower priced brands instead of national brands	18	22	21	15	17	16	16	17	17	27
Buy products on special even if you hadn't planned to	17	16	16	18	19	15	9	17	20	19
Go to supermarkets other than your principal one for advertised specials	9	5	9	9	10	13	5	11	10	6
Shop at a discount or warehouse store for grocery items	5	5	6	6	6	3	2	4	7	10

Buy Products on Special That Day Even If You Hadn't Planned To

■ Men are less likely than women to buy products on special without prior planning (Table 12A).

■ Shoppers from one-person households are less likely to buy products on special than those from multiple-person households (Table 12B).

■ Shoppers with household incomes between $35,001 and $50,000 are the least likely to buy products on special (Table 12C).

Go to Supermarkets Other Than Your Principal One for Advertised Specials

■ Shoppers under age 25 are less likely than older ones to seek specials at another supermarket (Table 12B).

■ Shoppers from one-person households are less likely than those from households of two to four persons to shop at another supermarket for advertised specials (Table 12B).

■ Households earning more than $25,000 are less likely to shop at more than one store for specials than households with lower incomes (Table 12C).

■ Shoppers with a high school education or less more often shop for specials at another supermarket than more educated consumers (Table 12C).

Shop at a Discount or Warehouse Store for Grocery Items

■ Men are less likely than women to shop for grocery items at a discount or warehouse food store (Table 12A).

■ Shoppers in the South and East shop at discount or warehouse stores less often than those in the Midwest (Table 12A).

■ Use of such stores increases with household size. Shoppers from one- and two-person households use these stores less frequently than shoppers from larger households (Table 12B).

■ Shoppers whose 1990 household incomes were at least $50,000 shopped at warehouse stores less often than all but shoppers with household incomes between $15,001 and $25,000 (Table 12C).

TABLE 12C

HOW SHOPPER SUBGROUPS VARY IN THEIR USE OF SUPERMARKET SPECIALS, COUPONS, AND PRICE COMPARISONS, BY INCOME AND EDUCATION

Q: *How often do you (READ EACH ITEM) — pretty much every time you shop, fairly often, only occasionally, or never?*

Base: The shopping public

		Income					Education	
	Total	Less than $15,000	$15,001-$25,000	$25,001-$35,000	$35,001-$50,000	Over $50,000	High School Or Less	Some College Coll./ Graduate
	%	%	%	%	%	%	%	%
Base	1,004	171	191	197	185	154	523	478
Pretty Much Every Time								
Use price-off coupons	36	36	34	35	41	38	39	33
Look in newspaper for grocery specials	33	44	36	31	31	26	39	27
Stock up when you find a bargain	24	28	27	25	21	22	28	21
Compare prices at different supermarkets	20	30	22	18	17	15	24	17
Buy store/lower priced brands instead of national brands	18	26	23	18	14	11	20	16
Buy products on special even if you hadn't planned to	17	18	29	18	12	19	18	15
Go to supermarkets other than your principal one for advertised specials	9	13	13	9	8	3	11	7
Shop at a discount or warehouse store for grocery items	5	8	4	6	7	2	6	5

Methods of Economizing

In 1991, *Trends* investigated the extent to which shoppers utilize eight methods of economizing. *Trends* further investigated whether these money-saving measures were long-standing or recently adopted. The largest numbers of shoppers — over half — say they "make more use of price-off coupons," "do more with leftovers," or "buy fewer luxury or gourmet items" to economize (Table 13). Slightly less "eat out less often" or "buy fewer convenience foods." As few as one out of three shoppers say they "buy only what's on their list" as a means of economizing.

■ For the most part, these methods of economizing are not new to shoppers. With the exception of "eating out less often," the majority of shoppers have been doing these "for awhile."

■ The importance of price should not be understated. As more shoppers economize this year than last, significantly more (from 66 percent to 71 percent) feel that price is a very important factor when shopping (Table 34). The greater importance that they place on price is consistent with the increasing importance they place on their supermarket providing "items on sale or money-saving specials" (see Table 1). Among shoppers who switched supermarkets in the past year, the proportion who did so to obtain lower prices is on the rise. More than eight out of 10 shoppers already have refused to buy products that cost too much (see Table 26).

TABLE 13

MONEY-SAVING BEHAVIOR

Q: *I'm going to read you some things that people have told us they do to economize on their food bills. For each one, please tell me if this is something you currently do.*

Base: The shopping public

Q: *Is this something you've been doing for a few years and are continuing to do now to economize or something that you've just begun to do recently?*

Base: Shoppers who currently use that method of economy

	Recency of Behavior		
	Currently Do	Been Doing Awhile	Just Begun
	%	%	%
Make more use of price-off coupons	58	78	22
Do more with leftovers	56	79	20
Buy fewer luxury or gourmet items	55	60	40
Eat out less often	50	54	46
Buy fewer convenience foods	46	61	38
Do more meal planning	42	65	35
Buy in larger quantity	39	68	32
Buy only what's on your list	34	81	19

■ Shoppers may be differentiated by their overall use of these methods of economizing (Table 14). Households with children are consistently more likely to economize than childless homes. In keeping with this, larger households more often look for ways to save money on groceries than smaller households. Age also influences how shoppers economize; younger shoppers appear to be the most cost conscious. Despite widespread differences between men and women in shopping patterns, they are relatively similar in the methods they use to economize. These and other differences are detailed below.

Make More Use of Price-Off Coupons

■ Consistent with findings on how frequently price-off coupons are used, women who do not work outside the home are more likely than either men or working women to use coupons.

■ Households with children, particularly those with two to six year-olds, make greater use of this measure than childless households.

■ Coupon use increases with household size. Twice as many households of five or more persons use coupons than one-person households.

Do More With Leftovers

■ Men and women who work outside the home are less likely than nonworking women to do more with leftovers.

■ Shoppers from the largest households do more with leftovers than those in households of four or fewer persons.

■ Shoppers aged 65 or older are more likely than younger ones to do more with leftovers.

Buy Fewer Luxury or Gourmet Items

■ Households with children economize by buying fewer luxury or gourmet items than childless households.

■ Shoppers aged 25-39 are more likely than all but 50-64 year-olds to save money by avoiding luxury and gourmet items.

Eat Out Less Often

■ Shoppers who have children at home say they eat out less often than those without children. This is particularly true of shoppers with young children — aged two to six.

■ Households of three to four persons are more likely than smaller ones to save money by not eating out.

■ Shoppers aged 65 or older are the least likely to save money by eating out.

Buy Fewer Convenience Foods

■ Women are more likely than are men to give up convenience to save money.

■ Households with children are more likely than those without to economize at the expense of convenience — particularly households with two to six year-olds.

■ Shoppers under age 25 are far more likely than older ones to forego convenience foods to economize.

Do More Meal Planning

■ Households with children do more meal planning than childless ones.

■ The extent to which shoppers plan meals increases with household size. Households of three or more persons are more likely than others to economize in this manner.

■ Shoppers under age 25 rely on meal planning much more than those 40 or older.

Buy in Larger Quantity

■ Households with children more often buy in larger quantities than do those without.

■ As expected, bulk-buying increases with household size. Shoppers from households of five or more persons are more than four times as likely as one-person households to buy in bulk to save money.

■ Bulk-buying declines with age: Shoppers under 25 are more likely than those 50 or older.

TABLE

14

CONSUMERS CURRENT AREAS OF ECONOMIZING

Q: *I'm going to read you some things that people have told use they do to economize on their food bills. For each one please tell me if this is something you currently do.*

Base: The shopping public

	Use More Price-off Coupons	Do More With Leftovers	Buy Fewer Gourmet Items	Eat Out Less Often	Fewer Conven. Foods	More Meal Planning	Buy Larger Quantity	Buy List Items Only
	%	%	%	%	%	%	%	%
Total	58	56	55	50	46	42	39	34
Sex								
Men	44	50	53	52	39	40	42	38
Women	63	58	56	49	49	42	37	32
Age								
18-24	64	53	44	56	72	58	56	36
25-39	59	55	63	60	48	44	47	37
40-49	58	56	52	48	43	39	43	31
50-64	57	51	59	46	42	38	29	31
65 +	54	68	42	33	42	36	20	30
Education								
HS or less	61	61	56	52	46	43	39	30
Some college/ college graduate	54	52	55	48	46	40	38	38
Size of household								
1	38	52	52	44	40	29	16	39
2	51	54	51	46	46	37	34	30
3-4	69	57	61	57	48	49	47	33
5 +	81	69	56	53	56	58	69	39
Type of household								
With children	70	58	62	61	52	49	52	34
Children aged 2-6	78	60	71	67	57	53	53	38
No children	50	55	52	43	43	37	30	33

Who Are the Heavy Economizers?

As part of its emphasis on money-saving measures, the 1991 *Trends* profiles shoppers who may be considered "heavy economizers." Included in this group are shoppers who currently practice at least five of the eight economizing measures outlined in Tables 13 and 14. This year, 18 percent of all shoppers were identified as heavy economizers (see Table 15).

The shoppers who exhibit the widest variety of economizing measures are:

- Women who do not work outside the home (21 percent).
- Those from households with children (24 percent), in particular those with children aged 2 to 6 (26 percent).
- From larger households—22 percent are from households of three to four persons, and 26 percent from households of five or more.
- Under age 25 (26 percent).
- In households earning between $35,001 and $50,000 in 1990 (24 percent).
- From the South (21 percent)

While heavy economizers spend, on average, as much as all shoppers on their weekly grocery bill, their per-person expenditure of $29 is slightly below the overall average of $32 reported for all shoppers (Table 15).

TABLE 15

PROFILE OF HEAVY ECONOMIZERS

Base: The shopping public**

		Heavy Economizers*
		1991
Total	%	18
Sex		
Men	%	17
Women	%	19
Working	%	18
Nonworking	%	21
Married		
One spouse at home	%	23
Two wage earners	%	20
Type of Household		
With children	%	24
Children ages 2-6	%	26
No children	%	15
Size of Household		
1	%	13
2	%	16
3-4	%	22
5 +	%	26
Age		
18-24	%	26
25-39	%	20
40-49	%	18
50-64	%	16
65 +	%	15
Income		
$15,000 or less	%	19
$15,001-$25,000	%	20
$25,001-$35,000	%	15
$35,001-$50,000	%	24
$50,000 or more	%	18
Region		
East	%	17
Midwest	%	19
South	%	21
West	%	14
Average Weekly Grocery Expenses		
Per family		$80
Per person		$29

* Included in the "heavy economizer" group are shoppers who currently practice five or more of the eight economizing measures summarized in Table 13.

** Split sample = 504

CHAPTER 3

SHOPPING PATTERNS

SWITCHING STORES

In 1991, for the third consecutive year, *Trends* surveyed store switching among shoppers. Nearly three out of four shoppers said that they had not changed stores (Table 16). The proportion who say they have changed stores stands at 24 percent, down three percentage points from 1990 and five percentage points from 1989.

The small decline in store switching behavior is largely the result of changes in one demographic segment: Fewer working women changed stores in 1991 than in 1990 (Table 16).

TABLE 16

SWITCHING STORES

Q: *During the past year have you switched grocery stores?*

Base: The shopping public

		Jan. 1989 Yes	Jan. 1990 Yes	Jan. 1991 Switched Stores: Yes	No	Not Sure
Total	%	29	27	**24**	74	2
Sex						
Men	%	30	29	**29**	68	2
Women	%	29	27	**22**	76	1
Working	%	30	30	**23**	75	1
Nonworking	%	28	24	**21**	78	1
Age						
18-24	%	34	33	**40**	57	3
25-39	%	35	31	**27**	71	2
40-49	%	28	28	**21**	79	0
50-64	%	24	22	**19**	81	1
65 or older	%	21	23	**22**	75	3
Income						
$15,000 or less	%	31	30	**23**	74	2
$15,001-$25,000	%	26	28	**26**	72	2
$25,001-$35,000	%	39	27	**23**	75	2
$35,001-$50,000	%	32	28	**24**	76	1
$50,001 or more	%	27	26	**25**	74	1
Region						
East	%	31	24	**26**	72	2
Midwest	%	26	26	**21**	78	1
South	%	33	30	**26**	74	1
West	%	25	30	**24**	73	3

When asked why they switched stores, shoppers cited price and convenience (see Table 17):

- Location/new store is closer/more conveniently located (44 percent).
- Better, lower prices (44 percent).

More variety and a greater selection also play a role in switching (26 percent), as does product quality, particularly better meats and produce (7 percent each). Notably, quality produce, good quality meat and a good variety or wide selection are among the five most important factors to shoppers when selecting a supermarket (see Table 1).

Reasons for store switching do not vary from those reported in 1989 and 1990. However, location is somewhat less important than in 1990, while lower prices is more so. Since 1989, the percentage of shoppers who have changed stores to pay lower prices has grown by seven points (from 37 percent to 44 percent). The rise corresponds to the increasing importance shoppers place on good, low prices when selecting a supermarket (Table 1).

TABLE 17

REASONS FOR STORE SWITCHING

Q: *For what reasons did you switch?*

Base: Those who switched grocery stores

		Jan. 1989 Total	Jan. 1990 Total	**Jan. 1991 Total**
Base		302	278	**243**
Location/new store is closer/more conveniently located	%	41	50	**44**
Better/lower prices	%	37	40	**44**
More variety/selection	%	23	28	**26**
Better meats	%	10	11	**7**
Better produce	%	9	9	**7**
Other	%	26	16	**15**
Not sure	%	1	1	**0**

Multiple responses accepted.

Visits to Supermarket in an Average Week

In 1991, shoppers averaged 2.3 trips per week to the supermarket—staying within the 2.0-2.6 range maintained over the last decade (Table 18). Household size continues to differentiate shoppers with respect to trip frequency. The frequency also varies by sex, presence of children and age (see Table 19):

- On average, men visit the grocery store more times per week than women.
- Shoppers with children average more trips per week than shoppers without children.
- Frequency increases with household size. Shoppers from households of five or more people visit the supermarket more often than those from smaller households.
- Shoppers aged 65 and older stand out as making fewer trips to the supermarket than younger shoppers.

TABLE 18

HOW OFTEN SHOPPERS GO TO THE SUPERMARKET IN AN AVERAGE WEEK: 1981-1991

Q: *About how many visits do you make to the supermarket in an average week? That includes going to the same store more than once and going to different stores.*

Base: The shopping public

	Total										
	Jan. 1981	Jan. 1982	Jan. 1983	Jan. 1984	Jan. 1985	Jan. 1986	Jan. 1987	Jan. 1988	Jan. 1989	Jan. 1990	**Jan. 1991**
	%	%	%	%	%	%	%	%	%	%	%
Number of Visits											
1	26	31	31	31	29	31	29	28	30	31	**30**
2	33	32	34	31	32	34	32	32	31	32	**34**
3	21	20	20	20	20	20	21	22	21	21	**19**
4	8	7	8	8	9	6	8	9	6	7	**8**
5	4	3	3	4	4	4	3	4	3	3	**4**
6 or more	6	3	3	3	4	2	4	3	5	3	**4**
Every 2 weeks	1	1	*	2	2	1	1	2	3	3	**2**
Average number of supermarket visits per week	2.6	2.3	2.3	2.3	2.3	2.0	2.4	2.3	2.3	2.2	**2.3**

* Less than 0.5 percent.

TABLE

19

HOW OFTEN SHOPPERS GO TO THE SUPERMARKET IN AN AVERAGE WEEK

Q: *About how many visits do you make to the supermarket in an average week? That includes going to the same store more than once and going to different stores.*

Base: The shopping public

		Jan. 1991 Base	One	Two	Three	Four	Five	Six +	Every Two Weeks	Average
Total	%	1,004	30	34	19	8	4	4	2	2.3
Sex										
Men	%	263	26	36	19	9	5	5	1	2.4
Women	%	741	32	33	18	7	4	4	2	2.2
Working	%	411	35	29	19	7	4	5	1	2.3
Nonworking	%	327	28	37	17	8	3	2	4	2.2
Type of Household										
With Children	%	405	24	33	25	8	5	4	1	2.5
Children Aged 2-6	%	158	25	36	22	8	3	4	1	2.4
No Children	%	596	35	34	14	7	3	4	3	2.1
Size of Household										
1	%	173	39	33	13	4	3	4	5	2.0
2	%	342	33	36	13	9	4	3	2	2.2
3-4	%	389	26	33	24	8	4	4	1	2.4
5 or more	%	95	21	26	26	12	6	8	0	2.8
Age										
18-24	%	77	34	38	10	7	3	8	1	2.3
25-39	%	348	30	35	20	6	4	4	1	2.3
40-49	%	212	28	29	22	11	5	3	1	2.4
50-64	%	220	30	34	18	8	4	4	2	2.3
65 and older	%	124	37	32	13	7	3	2	5	2.0

May not add to 100 percent due to rounding.

Supermarkets and Takeout Food

Since 1986, *Trends* has asked shoppers where they usually buy food that is eaten at home, but not prepared at home. Fast-food restaurants remain the most common source of takeout food. More than half say they usually purchase takeout meals from a fast-food restaurant (see Table 20), up from 41 percent in 1988. About one in four buy takeout food from a restaurant (23 percent) and more than one in 10 buy it from a supermarket (14 percent).

Fast-food restaurants continue to grow as a source of takeout foods, from 41 percent in 1988 to 51 percent in 1991. At the same time, restaurants continue the decline first noted from 1988 to 1989. Since 1988, the proportion of shoppers who most often buy takeout food from a restaurant has dropped from 38 percent to 23 percent. Use of supermarkets has remained stable over the past year (14 percent), but is above that reported in 1987 (9 percent).

The use of supermarkets as a source of takeout food varies by sex, marital status, household size, age and income (Table 21).

- Nonworking women and men get takeout food from the supermarket more frequently than working women.
- Married shoppers use the supermarket less often than unmarried shoppers.
- Shoppers from one-person households buy takeout from the supermarket with greater frequency than shoppers from households of two or more.
- Shoppers 65 or older takeout from supermarkets far more often than younger shoppers.
- Shoppers from households with incomes of $35,001 or more use the supermarket for this purpose less often than others.

TABLE 20

SOURCE OF TAKEOUT FOOD: 1986-1991

Q: *When meals are eaten at home, but not prepared at home, where do you usually buy the food? Would you say most often from a fast-food restaurant, a restaurant, a supermarket, convenience store, or from some other place?***

Base: The shopping public

	Jan. 1986 Total	Jan. 1987 Total	Jan. 1988 Total	Jan. 1989 Total	Jan. 1990 Total	**Jan. 1991 Total**
Base***	1,004	1,007	1,019	1,031	514	**1,004**
	%	%	%	%	%	**%**
Fast-food restaurant	43	44	41	41	46	**51**
From a restaurant	38	33	38	33	27	**23**
From a supermarket	10	9	11	12	14	**14**
From a convenience store	x	x	x	x	2	**2**
Some other place	2	7	3	6	2	**1**
It varies (volunteered)	1	1	1	3	4	**3**
Don't eat out	x	x	x	7	6	**4**
Not sure	3	3	4	1	*	**1**

x = Not asked.

* Less than 0.5 percent.

** In 1986-1989, question wording was "Would you say most often from a fast-food store, a carryout section of a restaurant, a carryout section of a supermarket or from some other place?"

*** 1990 split sample.

TABLE

21

USE OF SUPERMARKETS AS SOURCES OF TAKEOUT FOOD

Q: *When meals are eaten at home, but not prepared at home, where do you usually buy the food? Would you say most often from a fast-food restaurant, a restaurant, a supermarket, a convenience store or from some other place?*

Base: The shopping public

		Jan. 1991 Base	Jan. 1991 Use Supermarket for Takeout Food
Total	%	1,004	14
Sex			
Men	%	263	16
Female	%	741	13
Working	%	411	11
Nonworking	%	327	16
Marital Status			
Married	%	357	12
Not married	%	646	17
Size of household			
1	%	173	20
2	%	342	11
3-4	%	389	13
5 or more	%	95	13
Age			
18-24	%	77	14
25-39	%	348	11
40-49	%	212	10
50-64	%	220	16
65 or older	%	124	26
Income			
$15,000 or less	%	171	19
$15,001-$25,000	%	191	15
$25,001-$35,000	%	197	15
$35,001-$50,000	%	185	9
$50,001 or more	%	154	8

CHAPTER 4

STORE PRODUCTS AND SERVICES

AVAILABILITY

For the sixth straight year, *Trends* reviewed the availability of store products and services in the supermarket (see Table 22). Since 1990, significant changes are evident with five of the 13 items about which shoppers are questioned. With the exception of one item, "unpackaged or bulk food," the items are more widely available now than one year ago. The largest increase was in gourmet foods, countering the decline from 1988 to 1990. This increase comes at a time when more than half of all shoppers say they currently economize by buying fewer luxury or gourmet items (Table 13). Items that are more widely available in 1991 than 1990 include:

- Deli or other carryout food items (+ 7 percentage points to 87 percent).
- Gourmet or specialty foods (+ 14 percentage points to 70 percent).
- A salad bar (+ 10 percentage points to 48 percent).
- Prescription drug counter (+ 6 percentage points to 36 percent).

Three products are available to nearly all shoppers:

- Food products designed especially for microwave cooking (94 percent).
- Private label or store brands (94 percent).
- Deli or other carryout food items (87 percent).

Available to more than two in three shoppers are gourmet or specialty foods (70 percent) and a floral department (69 percent). Three additional items are available to at least half:

- Fresh, not frozen, pizza (52 percent).
- Unpackaged or bulk food (51 percent).
- Postage stamps (51 percent).

Home delivery, a service about which shoppers were first questioned in 1991, is available in supermarkets to fewer than one in 10 (see Table 22).

TABLE

22

AVAILABILITY OF STORE PRODUCTS AND SERVICES

Q: *Thinking about the supermarket where you do most of your shopping, does it carry or have (READ EACH ITEM)?*

Base: The shopping public

		Jan. 1986 Yes	Jan. 1987 Yes	Jan. 1988 Yes	Jan. 1989 Yes	Jan. 1990 Yes	Jan. 1991* Yes	No	Not Sure
Food products designed especially for microwave cooking	%	86	89	93	94	93	**94**	4	2
Private label or store brands	%	x	x	x	x	93	**94**	4	2
Delicatessen or other carryout food items	%	74	78	80	82	80	**87**	12	1
Gourmet or specialty foods	%	70	72	74	66	56	**70**	27	3
Floral department	%	x	x	x	x	x	**69**	30	1
Fresh (not frozen) pizza	%	47	52	47	53	51	**52**	41	7
Unpackaged or bulk food	%	54	61	56	55	58	**51**	42	8
Postage stamps	%	x	29	34	46	46	**51**	32	17
Video rentals	%	x	38	44	50	47	**49**	43	8
A salad bar**	%	51	37	40	42	38	**48**	50	2
Food catering	%	38	41	45	47	49	**47**	43	10
Prescription drug counter	%	x	x	27	31	30	**36**	64	1
Home delivery	%	x	x	x	x	x	**8**	82	10

May not add to 100 percent due to rounding.

x = Not asked.

* Split sample; bases = 500 and 504.

** In 1986, shoppers were asked if their supermarket carried "items from a salad bar." In 1987, shoppers were asked if their supermarket had "a salad bar."

Using Store Products and Services

As in earlier *Trends*, shoppers whose supermarket provides a specific product or service were asked how often they used it (see Table 23). The products and services most likely to be used "frequently":

- Private label or store brands (44 percent).
- Deli or other carryout food items (25 percent).
- Food products designed especially for microwave cooking (25 percent).
- Unpackaged or bulk food (21 percent).

By way of comparison, one in five shoppers buy store brands or lower priced products pretty much every time they shop; another one in four do so fairly often (Table 10).

Another three items are "never" used by at least half of all shoppers for whom they are available:

- Home delivery (79 percent).
- Food catering (70 percent).
- Video rentals (56 percent).

Shoppers use available products and services about as often as they did a year ago. The proportion who use private label and store brands jumped seven percentage points, from 37 percent to 44 percent in 1991. With the exception of fresh, not frozen, pizza, all other items are used as often or slightly less than the past year.

Over the past few years, however, the use of a salad bar has declined by half, from 20 percent in 1986 to only 10 percent in 1991. Use of video rentals also has dropped. After reaching a peak of 17 percent in 1989, use of video rentals has declined to 8 percent in 1991. The drop may reflect lower interest in this service or the wider selection available at alternative outlets (e.g., Blockbuster).

While these statistics may indicate actual changes in shopper behavior, caution is necessary when interpreting these numbers due to the relatively small number of shoppers answering each question (only those shoppers whose supermarket provides the product or service respond to this question).

TABLE

23

SHOPPERS' USE OF STORE PRODUCTS AND SERVICES

Q: *How often do you use or purchase (READ EACH ITEM)? Would you say frequently, occasionally, rarely or never?*

Base: The shopping public who say their supermarkets have the product or service

		Frequently					Jan. 1991**				
		Jan. 1986	Jan. 1987	Jan. 1988	Jan. 1989	Jan. 1990	Frequently	Occasionally	Rarely	Never	Not Sure
Private label or store brands	%	X	X	X	X	37	**44**	38	9	8	1
Delicatessen or other carryout food items	%	25	28	27	27	29	**25**	38	24	13	0
Food products designed especially for microwave cooking	%	18	22	25	29	26	**25**	39	16	19	*
Unpackaged or bulk food	%	22	20	15	17	24	**21**	39	19	21	1
Postage stamps	%	X	30	23	20	22	**19**	24	15	41	0
Prescription drug counter	%	X	X	26	17	19	**19**	27	13	41	0
A salad bar***	%	20	13	12	14	11	**10**	26	29	42	0
Gourmet or specialty foods	%	8	13	8	14	12	**9**	34	39	17	*
Video rentals	%	X	11	14	17	11	**8**	20	16	56	0
Fresh (not frozen) pizza	%	6	11	10	10	6	**8**	27	27	38	0
Home delivery	%	X	X	X	X	X	**5**	10	7	79	0
Floral department	%	X	X	X	X	X	**4**	42	24	30	0
Food catering	%	3	2	2	2	2	**1**	11	17	70	*

May not add to 100 percent due to rounding.

X = Not asked.

* Less than 0.5 percent

** Split sample: bases = 500 and 504.

*** In 1986, shoppers were asked if their supermarket carried "items from a salad bar". In 1987, shoppers were asked if their supermarket had "a salad bar."

Potential Use of Store Products and Services

Shoppers whose supermarkets do not carry a particular item were asked how frequently they would use that item if it were available (see Table 24). Supermarkets appear to be anticipating shopper needs. Fewer than one in five shoppers whose supermarket lacks a specific product or service say they would be likely to use it frequently. Items that the largest numbers of these shoppers would use frequently:

- Deli or other carryout food items (19 percent).
- Postage stamps (16 percent).
- Unpackaged or bulk food (12 percent).

Deli or other carryout foods and unpackaged or bulk foods also are among the most widely used of the items available. Although 19 percent of shoppers whose supermarket lacks a deli say they would use one frequently, keep in mind that 87 percent of all supermarkets currently provide this feature, leaving little room for growth.

Notably, although postage stamps and bulk food are among the items shoppers would frequently use, if available, even more shoppers say they would *never* use them.

Three items, all with limited availability at present, also are among those that would never be used by at least half of the shoppers:

- Food catering (69 percent).
- Home delivery (64 percent).
- Prescription drug counter (51 percent).

Significant declines in anticipated use are evident for three products not currently available to some shoppers:

- Postage stamps (–10 percentage points to 16 percent).
- Private label or store brands (–20 percentage points to 10 percent).
- Prescription drug counter (–6 percentage points to 10 percent).

Anticipated use of microwave food products is down by nine percentage points as well. A slightly larger proportion expresses interest in unpackaged or bulk food, up four percentage points since 1991. As noted previously, caution must be used when interpreting changes in which a small number of shoppers are eligible to respond.

TABLE 24

POTENTIAL USE OF STORE PRODUCTS AND SERVICES

Q: *If your supermarket carried or had (READ EACH ITEM), how often do you think you would use or purchase it? Would you say frequently, occasionally, rarely, or never?*

Base: The shopping public who say their supermarkets do not have the product or service

		Frequently					Jan. 1991**				
		Jan. 1986	Jan. 1987	Jan. 1988	Jan. 1989	Jan. 1990	**Frequently**	Occasionally	Rarely	Never	Not Sure
Delicatessen or other carryout food items	%	13	18	22	13	16	**19**	39	29	13	0
Postage stamps	%	x	27	22	27	26	**16**	25	18	39	2
Unpackaged or bulk food	%	9	11	10	8	8	**12**	29	19	38	1
Private label or store brands	%	x	x	x	x	30	**10**	57	10	24	0
Food products designed especially for microwave cooking	%	7	16	7	19	19	**10**	43	5	43	0
Prescription drug counter	%	x	x	14	17	16	**10**	18	19	51	2
A salad bar***	%	8	11	12	15	11	**10**	19	31	40	1
Video rentals	%	x	9	12	9	8	**10**	22	21	45	1
Fresh (not frozen) pizza	%	7	10	12	12	8	**6**	36	32	25	1
Gourmet or specialty foods	%	4	8	8	13	7	**6**	26	36	31	1
Home delivery	%	x	x	x	x	x	**6**	12	16	64	1
Floral department	%	x	x	x	x	x	**2**	30	27	40	1
Food catering	%	3	4	2	3	3	**1**	10	20	69	0

May not add to 100 percent due to rounding.

x = Not asked.

* Less than 0.5 percent.

** Split sample; bases = 500 and 504.

*** In 1986, shoppers were asked if their supermarket carried "items from a salad bar." In 1987, shoppers were asked if their supermarket had "a salad bar."

CHAPTER 5

CONSUMER ACTIVISM AND THE ENVIRONMENT

GENERAL CONSUMER ACTIVISM

For the first time since 1984, *Trends* investigated shopper participation in organized consumer activities, such as boycotts against particular products or stores. In addition, the 1991 *Trends* asked shoppers whether they had made a conscious choice not to purchase a product because of concerns about ethics, packaging or the policies of the manufacturer (see Table 25).

As in the early 1980s, refusing to buy products that cost too much continues to be the primary action that consumers have taken (84 percent). Fewer than half have taken any other single action. Other actions consumers have taken are largely a result of personal beliefs that are not in accord with those of manufacturers. Nearly one out of two shoppers has declined to purchase a product because they disagreed with the manufacturer's policies (47 percent). Slightly fewer shoppers said they refused to purchase a product because of the potential for unethical treatment of animals (38 percent). Just under one in three has limited product purchases as a result of environmental concerns — unnecessary or unrecyclable packaging (30 percent). Only a small minority — 13 percent — have gone so far as to join an organized consumer boycott.

Compared with shoppers in the early 1980s, more current ones have refused to buy products on the basis of excessive prices or joined an organized consumer boycott (Table 25). Differences between 1991 shoppers and those in the 1980s may reflect real changes in behavior. Caution must be exercised in reviewing these findings, because the wording of the question was different (see footnote to Table 25).

TABLE 25

ACTIONS CONSUMERS HAVE TAKEN

Q: *First, I'd like to know if you personally have already done any of the following.*

Base: The shopping public

	Have Already Done			January 1991		
	Jan. 1982	Jan 1983	Jan. 1984**	Yes	No	Don't Know
Refuse to buy products that cost too much	77%	70%	72%	**84%**	16%	1%
Refuse to buy products manufactured by companies whose policies you do not agree with	X	X	X	**47%**	52%	2%
Refuse to buy products where ethical treatment of animals may be called into question	X	X	X	**38%**	58%	4%
Refuse to buy products because of unrecyclable or unnecessary packaging	X	X	X	**30%**	69%	1%
Join an organized consumer boycott against particular products or stores	8%	7%	9%	**13%**	87%	*

Numbers may not add to 100% owing to rounding.

X = Not asked.

** In 1984 and earlier, respondents were asked: "Is this something you already have done, something you are ready to do, something you can sympathize with but wouldn't do, or something you think is ineffective, wrong or illegal?" Percentages shown are the sum of those who answered "already have done" or "ready to do."

Shoppers who have not already participated in a particular activity were further asked their future willingness to do so. When combining the number of shoppers who say they would be "very likely" to participate in the specified activity, the level of activism increases sharply for all activities except "refusing to buy products that cost too much." Shoppers in 1991 are more likely than those in 1984 to express a willingness to refuse to buy products because they cost too much, but less likely to say they are willing to join an organized consumer boycott (see Table 26).

TABLE 26

ACTIONS THAT CONSUMERS ARE WILLING TO TAKE BUT HAVE NOT ALREADY DONE SO

Q: *First, I'd like to know if you personally have already done any of the following.*

Q: *How likely would you be to (READ EACH ITEM)? Please use a 5-point scale where "1" means "not at all likely" and "5" means "very likely."*

Base: The shopping public

	Have Already Done or Are Very Likely to Do			
	Jan. 1982	Jan. 1983	Jan. 1984**	**Jan. 1991**
Refuse to buy products that cost too much	85%	77%	79%	**87%**
Refuse to buy products manufactured by companies whose policies you do not agree with	X	X	X	**57%**
Refuse to buy products where ethical treatment of animals may be called into question	X	X	X	**48%**
Refuse to buy products because of unrecyclable or unnecessary packaging	X	X	X	**38%**
Join an organized consumer boycott against particular products or stores	27%	23%	25%	**21%**

X = Not asked.

** In 1984 and earlier, respondents were asked: "Is this something you already have done, something you are ready to do, something you can sympathize with but wouldn't do, or something you think is ineffective, wrong or illegal?" Percentages shown are the sum of those who answered "already have done" or "ready to do."

Participation in Environmental Activities

For the first time, in 1991 *Trends* asked shoppers about their participation in environmental activities at home (Table 27). Participation in recycling activities is widespread. Majorities of shoppers report that they currently recycle aluminum (74 percent) or newspapers (64 percent). A substantial minority — more than two out of five — currently recycle plastics and glass. The extensive participation in recycling activities probably reflects a desire to exhibit environmentally conscious behaviors, *as well as* the need to comply with community-based mandatory recycling programs.

Demographic differences are apparent in recycling behavior (see Table 27). The propensity to recycle is somewhat greater among women than men, and as household size and income increase. Shoppers from the East and the West are the most likely to recycle. Subgroup differences for each of the four categories of recyclables summarized below.

Aluminum

■ One-person households are less likely to recycle aluminum than multiple-person households.

■ Shoppers from the West are more likely than those elsewhere.

Newspapers

■ Women are more likely than are men to recycle newspapers.

■ College-educated shoppers more often recycle these than shoppers with a high school education or less.

■ Shoppers from the largest households — five or more persons — are the most likely to recycle newspapers.

■ Westerners are most likely to recycle newspapers. Shoppers from the West and the East do so more often than those from the Midwest or South.

Plastics

■ Shoppers from the East and West are more likely to recycle plastics than those from other regions.

Glass

■ Shoppers whose 1990 household incomes exceeded $50,000 are more likely to recycle glass than those with incomes of $15,000 or less.

■ Shoppers from the East and West recycle glass more often than others. Southerners are the least likely to do so.

TABLE 27

CONSUMER PARTICIPATION IN ENVIRONMENTAL ACTIVITIES AT HOME

Q: *Now, I'd like to know if you have already done any of the following. For each item, please tell me if this is something you have already done at home.*

Base: The shopping public

	1991 Base		Have Already Recycled...			
			Aluminum	Newspapers	Plastics	Glass
Total	1,004	%	74	64	48	44
Sex						
Men	263	%	72	56	45	44
Women	741	%	75	67	49	45
Education						
High school or less	523	%	75	57	46	42
Some college/College graduate	478	%	73	72	49	46
Size of Household						
1	173	%	66	62	43	42
2	342	%	73	64	47	44
3-4	389	%	79	63	50	44
5+	95	%	77	75	51	52
Income						
$15,000 or less	171	%	73	60	43	37
$15,001-$25,000	191	%	77	65	46	44
$25,001-$35,000	197	%	74	60	50	44
$35,001-$50,000	185	%	77	68	48	46
$50,000 or more	154	%	73	70	53	50
Region						
East	240	%	73	70	58	58
Midwest	290	%	74	57	41	40
South	317	%	70	60	42	33
West	157	%	85	77	57	54

Influence of Recycled Packaging on Product Purchases

As a means of addressing consumers' expectations of supermarkets and food packaging, the 1991 *Trends* asked consumers how much their product buying decisions are influenced by product packaging. Specifically, shoppers were asked the degree to which packaging made from recycled materials would make them more or less likely to buy a food or nonfood product.

Product packaging made from recycled materials appears to play a role in the shopper's product purchase decision. This influence typically is more positive than negative, although the type of packaging is of little consequence to fully one-third of the shoppers surveyed (see Table 28). The response to recycled packaging is somewhat more positive for nonfood than food products.

Three out of five shoppers say they would be more likely to buy a nonfood product like shampoo or cleaning supplies if the label said the package was made from recycled materials. Virtually as many shoppers say they would be more likely to buy a food product such as cereal, pasta or applesauce if the package was made from recycled materials. Fewer than one in 10 shoppers would be less likely to buy either a nonfood (5 percent) or food (9 percent) product as a result of recycled packaging. As many as one in three shoppers, however, report that they would not be influenced by the label's reference to this type of product packaging.

TABLE 28

LIKELIHOOD OF PURCHASING FOOD AND NONFOOD PRODUCTS IN RECYCLED PACKAGING

Q: *If the label on a nonfood product like shampoo or cleaning supplies or the like said that the package was made from recycled materials, would you be. . .?*

Q: *If the label on a food product like cereal, pasta or applesauce or the like said that the package was made from recycled materials, would you be. . .?*

Base: The shopping public

	Nonfood Product	Food Product
More Likely to Buy Product	60%	56%
Much more likely	30	26
A little more likely	30	30
Less Likely to Buy Product	5%	9%
A little less likely	3	6
Much less likely	2	3
Not Influenced by the Label at All	34%	34%
Don't know	1	1

Certain subgroups of shoppers are more open to purchasing food and nonfood products in packages made from recycled materials (see Table 29). Women are more easily influenced than men. Persons with a college education place greater influence on a package made from recycled materials than those with a high school education or less. Age also plays a role: Shoppers 25-49 are the most likely to be influenced by the label; shoppers 65 or older are the least likely. Household income also influences shoppers: Particularly for *food* products, shoppers with higher household incomes would be more likely to buy a product in recycled packaging than those earning less.

TABLE 29

CONSUMERS WHO WOULD BE MORE LIKELY TO PURCHASE PRODUCTS IF THE PACKAGE IS MADE FROM RECYCLED MATERIALS

Q: *If the label on a nonfood product like shampoo or cleaning supplies or the like said that the package was made from recycled materials, would you be. . . ?*

Q: *If the label on a food product like cereal, pasta or applesauce or the like said that the package was made from recycled materials, would you be. . . ?*

Base: The shopping public

	Jan. 1991 Base		More Likely to Buy: Nonfood Product	More Likely to Buy: Food Product
Total	1004	%	60	56
Sex				
Men	263	%	54	52
Women	741	%	63	58
Education				
High school or less	523	%	53	49
Some college/college graduate	478	%	68	63
Income				
$15,000 or less	171	%	54	50
$15,001-$25,000	191	%	59	54
$25,001-$35,000	197	%	61	55
$35,001-$50,000	185	%	70	61
$50,001 or more	154	%	64	68
Age				
18-24	77	%	60	56
25-39	348	%	64	61
40-49	212	%	62	59
50-64	220	%	61	55
65 +	124	%	50	41

Influence of Environmentally Safe Products and Practices on Supermarket Selection

In 1991, *Trends* assessed the extent to which environmentally safe products and practices affect a shopper's selection of a primary supermarket. All other things being equal, shoppers were asked how likely they would be to switch supermarkets if a new one opened nearby that promoted environmentally safe products and practices (see Table 30). Despite the enthusiasm for recycling noted earlier, shoppers exhibit some resistance to store switching. While as many as 57 percent would definitely or probably change, only one in 10 would "definitely" change to a new supermarket that encouraged environmentally sound practices. Of the remaining shoppers, 32 percent would "probably not" change and 6 percent would "definitely not" change.

These findings are not surprising given that only 24 percent of all shoppers report that they switched primary supermarkets over the past year. Among those who switched, environmental concerns were not mentioned—while better prices and a more convenient location were the most oft-cited reasons (see Tables 16 and 17).

Certain groups of consumers would be more likely than others to switch supermarkets because of environmentally safe products and practices:

- Fully 60 percent of women say they would "definitely" or "probably" change supermarkets, compared with only 52 percent of men.
- The influence of environmentally safe products and practices declines with age: Shoppers under 25 are the most likely to say they would change supermarkets (71 percent); shoppers aged 65 and older are the least likely (40 percent).

TABLE 30

LIKELIHOOD OF SWITCHING TO A SUPERMARKET THAT ENCOURAGES ENVIRONMENTALLY SAFE PRODUCTS AND PRACTICES

Q: *All other things equal, how likely would you be to change the supermarket where you do most of your shopping if a new store opened near you that encouraged environmentally safe products and practices? Would you say you would. . .*

Base: The shopping public

	1991 Base	Definitely Change	Probably Change	Probably Not Change	Definitely Not Change	Don't Know
Total	1,004	10%	48	32	6	5
Sex						
Men	263	10%	42	38	5	6
Women	741	10%	50	30	7	4
Age						
18-24	77	16%	55	23	4	3
25-39	348	10%	54	29	4	3
40-49	212	11%	48	31	5	5
50-64	220	9%	42	37	6	6
65 +	124	7%	33	40	15	7

Responsibility for Ensuring That Supermarkets Exhibit Environmentally Safe and Friendly Practices

In 1991, as part of its inquiry into shoppers' impressions of environmental issues, *Trends* asked shoppers on whom they rely to ensure that the food and nonfood products they buy in their supermarket are environmentally safe and friendly. As shown in Table 31, shoppers place the primary responsibility with manufacturers (37 percent). About one out of four place responsibility with the government (24 percent). Substantially fewer shoppers feel that responsibility lies with the individual (12 percent), and slightly fewer (9 percent) rely on consumer organizations or retailers.

TABLE 31

PRIMARY RESPONSIBILITY FOR ENSURING THAT SUPERMARKETS EXHIBIT ENVIRONMENTALLY SAFE AND FRIENDLY PRACTICES

Q: *Who do you feel should be primarily responsible for ensuring that the food and nonfood products you buy in your supermarket are environmentally safe and friendly?*

Base: The shopping public

	Jan. 1991 Total
Base	1,004
Manufacturers	37%
Government	24
Yourself as an individual	12
Consumer organizations	9
Retailers	9
All are responsible	3
Farmers	2
No one	1
Other	0
Not sure	4

CHAPTER 6

NUTRITION

EVALUATION OF DIET

For the third year in a row, *Trends* asked shoppers to evaluate the healthfulness of their diets (Table 32). More than two-thirds believe that their diet could be at least somewhat healthier (69 percent). Only one out of 10 shoppers think their diet is as healthy as it could possibly be, although another one in five believe that their diet is healthy enough (21 percent).

Shoppers may be differentiated by how satisfied they are with the healthfulness of their diet. Shoppers who feel that their diets leave room for improvement:

- Men and working women, more so than nonworking women.
- Shoppers from households without children, more than do those with children.
- Shoppers under age 40; in contrast to those at least 65 and older, who are the most satisfied that their diet is healthy.
- Shoppers with a 1990 household income of at least $15,000, more so than those earning less than $15,000 annually.

After a slight decline from 1989 to 1990, the proportion who believe that their diet could stand improvement has increased by four percentage points (from 65 percent to 69 percent). Three groups of 1991 shoppers are more likely to believe that there is room for improvement:

- Men (+ eight percentage points to 71 percent).
- Households without children (+ six percentage points to 65 percent).
- Shoppers earning $35,001-$50,000 (+ 16 percentage points to 74 percent).

Shoppers rely primarily on eating more fruits and vegetables to ensure that their diets are healthy (57 percent). One out of three shoppers eat less meat, particularly red meat (34 percent), and another one in four have limited their reliance on fats and oils (25 percent). Just under one in five say they have been eating less sugar (19 percent) and slightly less have been eating more chicken or fiber (16 percent each).

The proportion of shoppers who are consuming more fish has dropped significantly over the past year (from 18 percent to 14 percent), as have the proportion who are eating less salt (from 15 percent to 10 percent). Notably, the importance of a fresh seafood market when selecting a supermarket also has declined over the past year (see Table 1). Concern over cholesterol and fried food is waning; fewer 1991 shoppers say that they are consuming "less cholesterol" (from 15 percent to 12 percent) or "less fried foods" (from 14 percent to 7 percent; see Table 33).

TABLE 32

EVALUATION OF DIET: 1989-1991

Q: *Thinking of all the foods you eat at home and away from home, how would you describe your diet? Would you say that it could be a lot healthier, could be somewhat healthier, is healthy enough, or is as healthy as it could possibly be?*

Base: The shopping public

		Could Be At Least Somewhat Healthier			Jan. 1991				
		Jan. 1989	Jan. 1990	**Jan. 1991**	Could Be a Lot Healthier	Could Be Somewhat Healthier	Is Healthy Enough	Is as Healthy as It Could Possibly Be	Not Sure
Total	%	67	65	**69**	16	53	21	10	*
Sex									
Men	%	63	63	**71**	17	54	22	7	0
Women	%	68	65	**68**	15	53	20	12	*
Working	%	73	72	**71**	17	55	18	11	1
Nonworking	%	63	57	**63**	13	50	24	13	0
Type of Household									
With children	%	74	70	**73**	16	58	20	7	*
Children aged 2-6	%	x	x	**72**	16	56	19	10	0
No children	%	61	59	**65**	15	50	22	13	*
Age									
18-24	%	75	77	**79**	30	49	20	1	0
25-39	%	73	70	**76**	17	59	18	6	0
40-49	%	77	71	**70**	13	57	21	9	1
50-64	%	59	58	**66**	12	54	19	15	1
65 or older	%	49	45	**51**	13	38	31	19	0
Income									
$15,000 or less	%	63	64	**61**	22	39	23	16	1
$15,001-$25,000	%	65	65	**70**	20	50	18	12	0
$25,001-$35,000	%	70	69	**75**	14	61	19	7	0
$35,001-$50,000	%	69	58	**74**	16	58	20	7	0
$50,001 or more	%	68	69	**72**	10	62	21	7	0

x = Not asked

* Less than 0.5 percent

TABLE

33

DIET BEHAVIOR

Q: *What, if anything, are you eating more or less of to ensure that your diet is healthy?*

Base: The shopping public

		Jan. 1989 Total	Jan. 1990 Total	**Jan. 1991 Total**
Base		1,031	1,005	**1,004**
More fruits/vegetables	%	59	57	**57**
Less meat/red meat	%	33	34	**34**
Less fats/oils	%	22	27	**25**
Less sugar	%	20	19	**19**
Eating more chicken	%	16	19	**16**
More fiber	%	13	16	**16**
Eating more fish	%	18	18	**14**
Less cholesterol	%	12	15	**12**
Less salt	%	13	15	**10**
Less fried foods	%	10	14	**7**
More fresh foods	%	8	6	**7**
Less dairy/butter/cheese/whole milk	%	x	x	**4**
Fewer calories	%	5	5	**4**
Less snack foods	%	x	x	**4**
More protein	%	5	4	**3**
More balanced diet/wider variety	%	3	5	**3**
More starch/rice/potato/pasta	%	x	x	**3**
More organically grown/natural foods	%	2	2	**2**
More vitamin/mineral supplements	%	2	1	**2**
More foods high in vitamins/minerals	%	2	1	**1**
Other	%	20	11	**9**
Nothing	%	5	7	**6**
Not sure	%	3	3	**3**

x = Not asked.

Multiple responses accepted.

Factors for Food Selection

Notwithstanding the concerns over convenience, the environment, nutrition, price and other factors, taste remains most important to shoppers when selecting groceries. Nine out of 10 consider it very important, followed by nutrition (75 percent), product safety (72 percent) and price (71 percent) (Table 34). The relative importance of nutrition and product safety has remained steady over the past year, consistent with the proportions of 1990 and 1991 shoppers who place importance on nutrition and related factors. While "quality fruits and vegetables" remains most important in supermarket selection, its importance has not increased over the past year (Table 1). Similarly, equal numbers of shoppers in 1990 and 1991 are eating more fruits and vegetables to maintain a healthy diet (Table 33).

Four items are "very" important to less than half of all shoppers: product packaging that can be recycled (48 percent); how well products can be stored (43 percent); food preparation time (38 percent); and ease of preparation (34 percent). Over time, shoppers place similar emphasis on food preparation time, but less importance on how well it can be stored and ease of preparation. Since 1988, the proportion of shoppers who rate how well it can be stored as very important has declined from 53 percent to 43 percent. Ease of preparation is rated as very important by 5 percent fewer shoppers in 1991 than in 1988 (34 percent versus 39 percent).

While nutrition plays an important role in food selection for most shoppers, it is more important to certain shopper subgroups (see Table 35). One notable exception to this is households with children: While these parents are less likely to feel that their diet could be at least somewhat healthier, they are no more likely than childless households to feel this way. Significant subgroup differences are described below:

- Women, more than men, view nutrition as very important.
- The importance of nutrition increases with age. Shoppers aged 40 to 64 attach the greatest importance to nutrition; shoppers under the age of 25 attach the least importance.
- Not unexpectedly, nutrition is more important to shoppers who consider their diet healthy than those who do not.
- Shoppers whose household includes someone on a restricted diet place greater importance on nutrition than others.

TABLE 34

IMPORTANCE OF VARIOUS FACTORS IN FOOD SELECTION

Q: *I'd like to start by reading a list of factors that may or may not be important when a person shops for food. For each factor, please tell me whether it is very important, somewhat important, not too important, or not at all important to you when you shop for food.*

Base: The shopping public

		Very Important			Jan. 1991				
		Jan. 1988	Jan. 1989	Jan. 1990	**Very Important**	Somewhat Important	Not at All Important	Not Important	Not Sure
Taste	%	88	87	88	**90**	8	1	*	*
Nutrition	%	72	76	75	**75**	22	2	1	*
Product safety	%	83	74	71	**72**	18	5	3	3
Price	%	65	64	66	**71**	23	5	1	*
Product packaging that can be recycled	%	x	x	x	**48**	32	14	6	*
Storability	%	53	40	43	**43**	37	16	3	2
Food preparation time	%	x	37	36	**38**	39	18	6	*
Ease of preparation	%	39	36	33	**34**	42	19	4	1

x = Not asked.

May not add to 100 percent due to rounding.

* Less than 0.5 percent.

TABLE

35

IMPORTANCE OF NUTRITION IN FOOD SELECTION

Q: *I'd like to start by reading a list of factors that may or may not be important when a person shops for food. For each factor, please tell me whether it is very important, somewhat important, not too important, or not at all important to you when you shop for food. How important is nutrition?*

Base: The shopping public

	Jan. 1991 Base		Jan. 1991 Very Important	Somewhat Important	Not Too Important	Not at All Important	Not Sure
Total	1,004	%	75	22	2	1	*
Sex							
Men	263	%	64	30	4	2	*
Women	741	%	79	19	2	*	0
Working	411	%	80	19	1	*	0
Nonworking	327	%	79	18	2	1	0
Age							
18-24	77	%	57	35	4	3	1
25-39	348	%	72	25	2	1	0
40-49	212	%	81	18	1	1	0
50-64	220	%	81	18	1	1	0
65 or older	124	%	75	18	7	1	0
Type of Household							
With children	405	%	77	21	2	1	0
Children aged 2-6	158	%	78	20	2	1	0
No children	596	%	75	22	3	1	*
Medically Restricted diet							
Yes	204	%	85	14	1	1	0
No	797	%	73	24	3	1	*
Type of diet							
Healthy	312	%	82	14	3	1	0
Not healthy	689	%	72	25	2	1	*

* Less than 0.5 percent

Nutritional Content of Diet

Shoppers remain very concerned about the nutritional content of the foods they eat. More than nine out of 10 shoppers are at least somewhat concerned with nutritional content (95 percent; see Table 36). The proportion who are very concerned is up one percentage point over the last two years, to 56 percent. With the exception of working women, the proportion of shoppers who are very concerned has held steady for all subgroups. Working women are more concerned about the nutritional content of their food than they were last year (up seven points to 58 percent).

Shoppers may be differentiated by their concern about nutrition. The subgroups of shoppers who express the most concern (see Tables 36, 37):

- Women are more concerned than men about the nutritional content of food.
- Shoppers without children are more concerned than those with children.
- Concern about nutrition increases with age—shoppers who are at least 50 years of age are most concerned, followed by 25-39 year-olds then those under age 25.
- Individuals who shop for a household member on a restricted diet are more concerned than those who do not.
- Persons who consider their diets healthy express nutritional concerns more often than those who feel their diets could be healthier.
- College-educated shoppers are more likely to be very concerned than those with a high school education or less.

Although the overall level of concern about nutrition is similar to that reported in 1990, the concern about specific items appears to be dropping. When asked the nature of their nutritional concerns, shoppers worry

TABLE 36

LEVEL OF SHOPPERS' CONCERN ABOUT THE NUTRITIONAL CONTENT OF FOODS: 1984-1991

Q: *Would you say you and your family are very concerned, somewhat concerned, not very concerned or not at all concerned about the nutritional content of the food you eat?*

Base: The shopping public

		Very Concerned							1991			
		1984	1985	1986	1987	1988	1989	1990	**Very Concerned**	Somewhat Concerned	Not Very/ Not at All Concerned	Not Sure
Total	%	63	59	58	54	**56**	55	55	**56**	39	5	0
Sex												
Men	%	62	51	55	48	48	51	50	**49**	45	6	0
Women	%	64	60	58	55	58	57	56	**59**	37	4	0
Working	%	64	60	54	49	53	51	51	**58**	38	4	0
Nonworking	%	63	62	62	62	64	63	64	**60**	35	5	0
Type of Household												
With Children	%	62	62	57	52	52	53	52	**51**	46	3	0
Children Aged 2-6	%	x	x	x	x	x	x	x	**51**	46	4	0
No Children	%	64	56	58	55	59	57	58	**60**	34	6	0
Age												
18-24	%	51	52	55	41	33	41	41	**44**	47	9	0
25-39	%	58	56	54	47	51	51	48	**51**	45	3	0
40-49	%	67	63	49	54	52	57	52	**51**	44	5	0
50-64	%	71	62	68	60	66	65	62	**67**	31	2	0
65 and older	%	67	58	65	69	72	63	74	**65**	23	11	0
Region												
East	%	66	63	58	58	54	53	56	**53**	39	8	0
Midwest	%	63	53	53	49	52	53	47	**55**	42	3	0
South	%	62	59	59	56	60	56	61	**58**	38	4	0
West	%	59	57	62	53	56	61	56	**60**	36	4	0

x = Not asked.

most about the fat content (42 percent) and cholesterol levels (37 percent; see Table 38). While these also were the top two concerns in 1990, concern about each is below that reported in 1990. However, only the decline in concerns about cholesterol is statistically significant (from 44 percent to 37 percent). These findings are consistent with those that fewer shoppers are lowering their intake of cholesterol and fried foods to ensure that their diet is healthy (see Table 33).

Shopper concern about fat, cholesterol and salt has dropped markedly for the first time since 1984. Concern about each appears to have reached its peak in 1990 then dropped in 1991. Over the past eight years, concerns about preservatives, nutritional value and chemical additives also are waning. Shoppers were much more concerned about these in 1984 than today.

One out of five shoppers is concerned about salt content (22 percent), down significantly from the 30 percent who expressed concern last year. The concern that shoppers express about vitamin and mineral content is on a par with last year, stabilizing after the dramatic drop noted from 1989 to 1990. While one in eight shoppers is still concerned about calorie reduction and eating less sugar, these concerns dropped significantly over the past year as well.

Only two items warrant increased concern among shoppers since last year: chemical additives and a general desire to eat what is good or healthy.

As in earlier surveys, the 1991 *Trends* asked shoppers the extent to which they believe certain items are health hazards. While unaided concern over fats and cholesterol has dropped, a significantly larger proportion of 1991 than 1990 shoppers believe that fats and cholesterol are serious health hazards (see Tables 38 and 39). This increase in the perceived seriousness of fats and cholesterol as a health hazard raises these items to the level of seriousness reported in 1988 (61 percent for fats; 59 percent for cholesterol).

The proportions who consider salt and sugar serious hazards remained steady over the past year but declined significantly since the mid-1980s. After holding steady at 42 percent to 44 percent from 1987 to 1989, only 32 percent of the shoppers surveyed in 1991 believe that salt is a serious health hazard. Less than one in five shoppers surveyed in 1991 regard sugar as a serious hazard, compared to 31 percent in 1984 (Table 39).

TABLE 37

LEVEL OF SHOPPERS' CONCERN ABOUT THE NUTRITIONAL CONTENT OF FOODS: 1990-1991

Q: *Would you say you and your family are very concerned, somewhat concerned, not very concerned or not at all concerned about the nutritional content of the food you eat?*

Base: The shopping public

		Jan. 1990	January 1991			
		Very Concerned	**Very Concerned**	Somewhat Concerned	Not Very/ Not at All Concerned	Not Sure
Total	%	55	**56**	39	5	0
Medically restricted diet						
Yes	%	70	**69**	28	3	0
No	%	51	**53**	42	5	0
Description of diet						
Healthy enough	%	66	**70**	24	7	0
Could be healthier	%	49	**50**	46	4	0
Education						
High school or less	%	56	**53**	40	7	0
Some college/college graduate	%	54	**60**	37	3	0

May not add to 100 percent due to rounding.

TABLE

38

NATURE OF SHOPPERS' CONCERN ABOUT THE NUTRITIONAL CONTENT OF FOODS: 1984-1991

Q: *What is it about the nutritional content of what you eat that concerns you and your family most?*

Base: The shopping public

	1984 Total	1985 Total	1986 Total	1987 Total	1988 Total	1989 Total	1990 Total	**1991 Total**	1990-1991 Percentage Point Change
	%	%	%	%	%	%	%	%	
Fat content, low fat	8	13	17	16	27	29	46	**42**	−4
Cholesterol levels	8	10	13	14	22	38	44	**37**	−7
Salt content, less salt	17	19	20	22	26	25	30	**22**	−8
Calories, low calories	9	9	11	14	14	15	19	**12**	−7
Sugar content, less sugar	22	20	18	16	20	15	16	**12**	−4
Vitamin/Mineral content	19	17	22	21	21	21	14	**15**	+1
Preservatives	17	13	15	14	16	9	7	**8**	+1
Food/nutritional value	19	14	11	13	14	8	6	**8**	+2
Fiber content	1	2	3	4	5	5	5	**3**	−2
Making sure we get a balanced diet	9	11	14	14	11	10	4	**5**	+1
Chemical additives	25	18	16	10	12	7	4	**8**	+4
Freshness, purity, no spoilage	12	8	8	8	15	6	4	**4**	0
Ingredients/content	0	0	0	0	8	4	4	**6**	+2
Desire to be healthy/ eat what's good for us	0	3	6	7	7	6	3	**8**	+5
Chemicals	0	0	0	0	4	3	3	**4**	+1
Protein value	6	4	5	4	6	4	2	**4**	+2
As natural as possible, not overly processed	6	5	3	0	4	3	2	**3**	+1
Less red meat	0	2	2	0	0	3	2	**1**	−1
Quality of food	5	1	1	0	0	3	2	**3**	+1
No harmful ingredients, nothing that causes illness/cancer	6	5	5	0	0	2	2	**2**	0
Carbohydrate content	2	2	2	2	3	2	1	**2**	+1
Starch content	1	1	1	0	0	1	2	*	−2
Artificial sweetener	0	2	1	*	0	1	1	**1**	0
Processed foods	0	0	0	0	3	1	1	**1**	0
Less frying/more broiling	0	0	0	0	2	1	1	**1**	0
Excess food coloring, dyes	4	3	2	3	0	1	*	**1**	+1
Empty calories, junk food	4	5	2	7	6	2	*	**2**	+2
Not sure/refused	5	6	5	7	2	7	6	**9**	+3

Multiple responses accepted.

* Less than 0.5 percent.

TABLE

39

CONSUMER CONCERN ABOUT SELECTED NUTRITION-RELATED ATTRIBUTES: 1984-1991

Q: *I'm going to read a list of food items that may or may not constitute a health hazard. For each one, please tell me if you believe it is a serious health hazard, somewhat of a hazard, or not a hazard at all?*

Base: The shopping public

		Serious Hazard							1991			
		1984	1985	1986	1987*	1988**	1989	1990	**Serious Hazard**	Something of a Hazard	Not a Hazard At All	Not Sure
Fats	%	x	42	44	55	61	58	54	**62**	35	3	1
Cholesterol	%	45	44	48	51	59	61	47	**58**	38	4	1
Salt in food	%	37	39	40	43	42	44	34	**32**	59	8	1
Sugar in food	%	31	29	29	28	28	23	17	**18**	59	22	2

May not add to 100 percent due to rounding.

x = Not asked.

* Split sample; bases = 498 and 509.

** Split sample; bases = 508 and 511.

Responsibility for Food Nutrition

For the third consecutive year, shoppers were asked on whom they rely to ensure that the food they buy is nutritious. Shoppers are relying more on the private sector for ensuring that supermarkets provide nutritious foods. Consistent with last year, the largest single proportion feel that this is their own responsibility (38 percent; see Table 40). One-fourth hold manufacturers responsible (up five percentage points from 1990), while significantly fewer rely on government (down six points to 17 percent). Notably, equal numbers of shoppers in 1990 and 1991 rely on state government, while the number who rely on the federal government has declined.

In keeping with findings over the past two years, fewer than one in 10 shoppers relies on consumer organizations or retailers to ensure that the food they buy is nutritious.

TABLE 40

THOSE ON WHOM SHOPPERS RELY TO ENSURE THAT THE PRODUCTS THEY BUY ARE NUTRITIOUS

Q: *Who do you feel should be primarily responsible for ensuring that the food you buy from the supermarket is nutritious: the federal government, the state government, consumer organizations, manufacturers, retailers, or yourself as an individual?*

Base: The shopping public

	Jan. 1989 Total	Jan. 1990 Total	**Jan. 1991 Total**
Base	1,031	1,005	**1,004**
Yourself as an individual	29%	36%	**38%**
Manufacturers	29	21	**26**
Government	28	23	**17**
Federal	22	17	**12**
State	6	5	**5**
Consumer organizations	6	7	**6**
Retailers	4	6	**6**
All/everybody	x	x	**3**
Other (volunteered)	1	4	*
None (volunteered)	*	1	*
Not sure		34	**3**

x = Not mentioned.
* Less than 0.5 percent.

CHAPTER 7

FOOD SAFETY

Consumer confidence in the safety of the food supply is now at an all-time high, with 82 percent either completely or mostly confident. This represents an increase of three percentage points since January 1990 and 17 points since confidence reached an all-time low of 65 percent in 1989 following the controversies involving Alar and Chilean grapes. The current resurgence in consumer confidence may be related to the lack of any highly publicized tampering incidents between January 1990 and January 1991.

Factors for Food Selection

Food safety continues to be an important shopper concern. Nine in 10 shoppers rated product safety as at least somewhat important when shopping for food Table 41). Nearly three out of four rate product safety as a very important concern. The importance that shoppers attach to food safety is on a par with that reported in 1990.

Shoppers may be differentiated by the importance they place on product safety. Since 1989, perceptions held by these subgroups have remained constant.

- Women who do not work outside the home are more concerned with food safety than either men or working women.
- Shoppers who share their household with children place more importance on food safety than others.
- Shoppers under age 25 are less likely than older respondents to attach importance to food safety.
- Shoppers with a high school degree or less find product safety more important than shoppers with a college education.
- Individuals who shop for someone on a medically restricted diet view product safety as more important than others.

[1]The 1991 category "spoilage (NET)" corresponds to the category "spoilage and germs" in 1990 and earlier. Specific mentions of germs were broken out from the overall category of "spoilage" in 1991.

TABLE

41

IMPORTANCE OF PRODUCT SAFETY IN FOOD SELECTION: 1989-1991

Q: *I'd like to start by reading a list of factors that may or may not be important when a person shops for food. For each factor, please tell me whether it is very important, somewhat important, not too important, or not at all important to you when you shop for food. How important is product safety?*

Base: The shopping public

		Jan. 1989 Very Important	Jan. 1990 Very Important	Jan. 1991				
				Very Important	Somewhat Important	Not Too Important	Not At All Important	Not Sure
Total	%	74	71	**72**	18	5	3	3
Sex								
Men	%	64	64	**62**	23	7	5	3
Women	%	77	73	**76**	16	4	2	2
Working	%	74	66	**72**	18	4	3	2
Nonworking	%	79	80	**81**	14	2	*	2
Type of household								
With children	%	77	73	**78**	16	4	1	2
Children aged 2-6	%	x	x	**79**	15	3	1	3
No children	%	72	69	**69**	20	5	4	3
Age								
18-24	%	70	64	**64**	26	7	4	0
25-39	%	69	69	**70**	20	6	2	2
40-49	%	79	70	**75**	16	3	3	4
50-64	%	80	75	**76**	17	3	2	3
65 or older	%	74	76	**74**	15	5	2	3
Education								
High school or less	%	76	74	**78**	15	4	2	2
Some college or more	%	72	67	**67**	22	5	4	3
Medically restricted diet								
Yes	%	85	73	**77**	19	1	2	1
No	%	71	70	**71**	18	5	3	3

* Less than 0.5 percent.
x = Not asked.

Confidence in the Food Supply

Beginning in 1989, *Trends* asked shoppers to rate their level of their confidence in the safety of the food at their supermarket. As shown in Table 42, 82 percent of all shoppers are mostly or completely confident in the safety of their food supply. Fully one in six (17 percent) are completely confident that the food is safe. Another two out of three shoppers (65 percent) are mostly confident that this is the case. The number of shoppers who express some doubt about food safety is equal to the number who express complete confidence (17 percent).

Shoppers are not easily differentiated by their level of confidence in the food supply. Consumer confidence is widespread. There are no longer any significant differences among subgroups of shoppers with respect to this issue. Men tend to express more confidence than women. Older shoppers tend to be more confident than younger ones. However, differences apparent in the earlier years no longer exist with respect to region and healthfulness of diet. Only when one looks at the proportions of shoppers who are completely confident do men, shoppers 65 or older and those with a healthy diet stand out from others (Table 42).

When asked to volunteer specific safety concerns, shoppers continue to feel that spoilage is the greatest threat (27 percent).[1] However, this number is declining. Pesticides, residues, insecticides and herbicides are of increasing concern to shoppers and are now mentioned by one out of five. Improper packaging or canning (17 percent) and chemicals (15 percent) are the only other items mentioned by more than one in 10 shoppers. Consistent with greater levels of confidence in the food supply and no publicly known cases of tampering, tampering is significantly less likely to be seen as a threat than it was last year (down six percentage points to 8 percent). (It should be noted that the 1991 *Trends* interviews were completed prior to the announcement of the Sudafed 12-hour cold capsule tampering incident in March 1991.) Unsanitary handling by supermarket employees is the only other item that was named as a threat (one in 10 shoppers).

TABLE 42

CONSUMER CONFIDENCE IN FOOD SAFETY: 1989-1991

Q: *How confident are you that the food in your supermarket is safe? Would you say you are completely confident, mostly confident, somewhat doubtful, or very doubtful?*

Base: The shopping public

		Completely or Mostly Confident			Jan. 1991				
		Jan. 1989	Jan. 1990	**Jan. 1991**	Completely Confident	Mostly Confident	Somewhat Doubtful	Very Doubtful	Not Sure
Total	%	81	79	**82**	17	65	15	2	1
Sex									
Men	%	84	82	**85**	22	62	13	2	1
Women	%	80	79	**81**	16	66	16	2	1
Working	%	80	80	**80**	15	65	17	2	1
Nonworking	%	81	78	**83**	17	66	14	2	1
Age									
18-24	%	79	90	**81**	10	70	17	1	1
25-39	%	79	81	**84**	17	66	14	1	1
40-49	%	80	78	**81**	17	65	16	2	1
50-64	%	86	78	**80**	16	63	19	1	1
65 or older	%	80	74	**89**	27	61	10	1	1
Region									
East	%	77	76	**80**	16	63	17	3	1
Midwest	%	86	82	**84**	19	65	15	1	0
South	%	82	78	**83**	17	66	14	1	2
West	%	79	81	**82**	17	65	15	1	1
Description of diet									
Healthy enough	%	84	80	**82**	21	61	14	2	2
Could be healthier	%	79	79	**82**	16	67	16	1	1

Shopper perceptions of the threats to food safety vary somewhat by subgroup. Women are less likely than men to see "tampering" as a threat, while the reverse holds true for "preservatives" (Table 43). Compared with shoppers with a high school education or less, the college-educated feel more threatened by "pesticides, residues, insecticides and herbicides," "improper packaging or canning," "chemicals" and "additives."

Shoppers from the West worry more than others about "pesticides, residues, insecticides and herbicides" and "unsanitary handling by supermarket employees," but are less worried about "spoilage." Midwesterners worry least about "chemicals" and Easterners are the most likely to view "preservatives" as a threat.

TABLE 43

PERCEIVED THREATS TO FOOD SAFETY, BY SEX AND EDUCATION (VOLUNTEERED)

Q: *What, if anything, do you feel are the greatest threats to the safety of the food you eat?*

Base: The shopping public

		Jan. 1989 Total*	Jan. 1990 Total	**Jan. 1991 Total**	Sex		High School or Less	Coll./ College Graduate
					Men	Women		
Base		772	1,005	**1,004**	263	741	523	478
Spoilage (NET)	%	36	29	**27**	30	26	28	26
Pesticides/residues/ insecticides/herbicides	%	16	19	**20**	18	20	16	23
Improper packaging/canning	%	17	16	**17**	19	16	15	20
Spoilage/germs	%	x	x	**16**	17	16	17	16
Chemicals	%	11	16	**15**	15	15	12	19
Unsanitary handling by supermarket employees	%	10	11	**10**	12	10	10	11
Tampering	%	20	14	**8**	12	7	7	10
Preservatives	%	7	8	**7**	4	8	6	9
Freshness/shelf life too long	%	x	x	**6**	7	6	7	5
Additives (non-specific)	%	7	6	**6**	3	6	3	8
Quality control/improper shipping, handling, etc.	%	x	x	**5**	7	4	5	5
Unsanitary handling by supermarket shoppers	%	6	4	**3**	2	3	3	2
Pollution/environmental pollution	%	3	4	**3**	2	3	2	4
Processing/preparation of foods	%	4	3	**3**	5	3	2	5
Bacteria/contamination	%	x	x	**3**	2	3	3	3
Bugs/pests/rats	%	3	3	**2**	2	2	2	3
Antibiotics	%	1	2	**2**	1	2	2	2
Artificial coloring	%	2	3	**1**	1	1	1	2
Radiation	%	1	1	**1**	*	1	0	1
Other	%	6	10	**4**	3	4	3	5
None	%	2	6	**3**	4	2	3	2
Not sure	%	11	12	**19**	16	20	25	12

Multiple responses accepted.

x = Not mentioned.

* In 1989 this question was asked only of those who were not completely confident that the food in their supermarket is safe. Differences may be attributable to methodology.

TABLE 44

PERCEIVED THREATS TO FOOD SAFETY, BY REGION (VOLUNTEERED)

Q: *What, if anything, do you feel are the greatest threats to the safety of the food you eat?*

Base: The shopping public

		Jan. 1989 Total*	Jan. 1990 Total	**Jan. 1991 Total**	Region			
					East	Midwest	South	West
Base		772	1,005	**1,004**	240	290	317	157
Spoilage (NET)	%	36	29	**27**	29	29	28	19
Pesticides/residues/ insecticides/herbicides	%	16	19	**20**	18	16	20	28
Improper packaging/canning	%	17	16	**17**	18	16	18	18
Spoilage/germs	%	x	x	**16**	15	19	17	13
Chemicals	%	11	16	**15**	19	11	14	19
Unsanitary handling by supermarket employees	%	10	11	**10**	10	10	9	16
Tampering	%	20	14	**8**	7	8	8	11
Preservatives	%	7	8	**7**	10	5	7	6
Freshness/shelf life too long	%	x	x	**6**	8	6	5	4
Additives (non-specific)	%	7	6	**6**	7	6	4	6
Quality control/improper shipping, handling, etc.	%	x	x	**5**	6	5	5	3
Unsanitary handling by supermarket shoppers	%	6	4	**3**	3	2	2	4
Pollution/environmental pollution	%	3	4	**3**	3	2	3	4
Processing/preparation of foods	%	4	3	**3**	4	3	4	3
Bacteria/contamination	%	x	x	**3**	5	1	3	1
Bugs/pests/rats	%	3	3	**2**	3	1	2	3
Antibiotics	%	1	2	**2**	1	1	2	3
Artificial coloring	%	2	3	**1**	3	1	1	1
Radiation	%	1	1	**1**	1	*	1	0
Other	%	6	10	**4**	5	3	4	4
None	%	2	6	**3**	3	3	3	1
Not sure	%	11	12	**19**	17	23	19	14

Multiple responses accepted.

x = Not mentioned.

* In 1989 this question was asked only of those who were not completely confident that the food in their supermarket is safe. Differences may be attributable to methodology.

The 1991 *Trends* once again asked shoppers to rate the extent that various food items may pose health hazards. In keeping with shoppers top-of-mind awareness of pesticides, "residues such as pesticides and herbicides" remain the single most serious health hazard. Eight out of 10 shoppers rate this to be a serious health hazard. This proportion has not changed over the past year (Table 45).

More than half of all shoppers (56 percent) consider antibiotics and hormones used in poultry and livestock a serious hazard. About two in five believe that irradiated foods and nitrites in food constitute serious health hazards. Additives and preservatives and artificial coloring are thought to be less threatening.

Over the past year, the proportions who view "nitrites in food," "additives and preservatives" and "artificial coloring" as serious threats has increased slightly though not significantly.

TABLE 45

CONSUMER CONCERN ABOUT SELECTED FOOD ATTRIBUTES: 1985-1991

Q: *I'm going to read a list of food items that may or may not constitute a health hazard. For each one, please tell me if you believe it is a serious health hazard, somewhat of a hazard, or not a hazard at all?*

Base: The shopping public

		Serious Hazard						1991			
		Jan. 1985	Jan. 1986	Jan. 1987*	Jan. 1988**	Jan. 1989	Jan. 1990	**Serious Hazard**	Something of a Hazard	Not A Hazard At All	Not Sure
Residues, such as pesticides and herbicides	%	73	75	76	75	82	80	**80**	17	2	1
Antibiotics and hormones in poultry and livestock	%	x	x	61	61	61	56	**56**	35	5	5
Irradiated foods	%	x	37	43	36	42	42	**42**	31	9	18
Nitrites in food	%	x	x	38	44	44	37	**41**	43	6	10
Additives and preservatives	%	36	33	36	29	30	26	**29**	60	9	2
Artificial coloring	%	28	26	24	21	28	21	**24**	50	24	2

May not add to 100 percent due to rounding.

x = Not asked

* Split sample: bases = 498 and 509.

** Split sample; bases = 508 and 511.

Responsibility for Food Safety

Shoppers are nearly twice as likely to feel that they, themselves, should take responsibility for product safety than to rely on any other source. Nearly four in 10 shoppers rely on themselves (39 percent). This represents an increase of four percentage points over the past year and may mark the end of the decline first noted in 1987. At the same time, 4 percent fewer shoppers rely on the government (to 23 percent in 1991). About one in five shoppers continues to believe that food safety is the manufacturer's responsibility (19 percent), up from only 7 percent in 1988. The proportion who rely on retailers continues to decline (8 percent) and the number who rely on consumer organizations holds steady at 7 percent (Table 46).

TABLE 46

THOSE ON WHOM SHOPPERS RELY TO ENSURE THAT THE PRODUCTS THEY BUY ARE SAFE

Q: *As far as you personally are concerned, whom do you rely on most to be sure that the products you buy are safe: the federal government, the state government, consumer organizations, manufacturers, retailers, or yourself as an individual?*

Base: The shopping public

	Total								
	1983	1984	1985	1986	1987**	1988***	1989	1990	**1991**
	%	%	%	%	%	%	%	%	%
Yourself as an individual	46	48	38	48	45	45	41	35	**39**
Government	27	25	37	33	28	29	23	27	**23**
Federal	24	22	31	29	25	26	20	22	**19**
State	3	3	6	4	3	3	3	6	**4**
Manufacturers	13	11	7	8	9	7	14	19	**19**
Retailers	5	5	6	2	5	3	10	9	**8**
Consumer organizations	6	9	8	9	15	15	8	7	**7**
All/everybody	x	x	x	x	x	x	x	x	**2**
Other (volunteered)	*	1	1	*	1	1	1	2	*
None (volunteered)	1	*	1	*	*	*	*	1	*
Not sure	2	1	2	*	2	2	2	1	**2**

May not add to 100 percent due to rounding.

x = Not asked.

* Less than 0.5 percent.

** Split sample; base = 498.

*** Split sample; base = 511.

TRENDS 91

METHODOLOGY

SELECTION OF THE SAMPLE

The data for this survey were collected from 1,004 telephone interviews conducted in January 1991. Households contacted for the survey were selected by a procedure known as random digit dialing (RDD). This procedure ensures the inclusion of individuals with unlisted or not yet listed telephone numbers, as well as those with listed numbers, and thus closely approximates the total U.S. population.

Each household selected was screened by the following three criteria:

- Male or female head of household.
- Having primary or equally shared responsibility for food shopping.
- Having shopped for groceries in the past two weeks.

Included were only heads of households who have primary or equally shared responsibility for food shopping and who had shopped for groceries in the past two weeks.

In contrast to prior *Trends* surveys, the sample was *not* controlled for sex of respondent. Rather, male and female head of households who met the above three criteria were interviewed as they "fell out." This was done so that 1991 *Trends* data and that for subsequent surveys in this series could be compared to similar international data. This procedure resulted in a 75 percent/25 percent ratio of females to males (compared with an 80 percent/20 percent ratio in prior years). The resultant sample is a nationwide cross-section of shoppers. Therefore, all subpopulation percentages are projectable to the U.S. shopping public as a whole.

Through 1990, the *Trends* sample was controlled to consist of 60 percent female heads of households and 40 percent male heads of households. The sample was then weighted to an 80 percent female/20 percent male ratio to approximate the actual proportions of female and male food shoppers and to maintain comparability with previous studies in the *Trends* series.

Given the relatively similar distributions of primary food shoppers by sex in the 1991 and prior surveys, the effect of this one-time change in the sampling methodology is minimal. A profile of the total 1991 unweighted sample as well as the weighted sample percentages for the 1990 sample are shown in Table 47.

Sampling Error

It is important to note that all survey results are subject to sampling error — i.e., the difference between obtained results and those that would be obtained by studying the entire population. The size of this error varies with the size of the sample and with the percentage of respondents giving a particular answer. Table 48 shows the range of error for samples of eight different sizes and at different percentages of response.

This table can be used to determine the approximate sampling errors associated with results presented in this report. An example illustrates this process.

As shown in Table 7 of this report, 39 percent of those surveyed this year spend $61 to $100 each week on groceries for their families. This percentage is based on the total sample of 1,004 shoppers. From the table below, the sampling error associated with a 40 percent response for a sample of 1,000 is plus or minus three percentage points. If one applies this sampling error to the 39 percent response in Table 7, the true proportion of shoppers who spend $61 to $100 a week should be no less than 36 percent and no more than 42 percent.

Aside from knowing the sampling error of any given finding, one may also be interested in whether the differences between certain percentage figures are a likely result of sample variation or due to real differences in the shopping population. For example, in Table 19 there is an 11-point difference between the percentage of households with children who go to the supermarket once in an average week and households without children who do this. Although this 11- point difference seems large, it could be due to sampling error. To determine whether this is a true difference, one needs to consider the number of people responding to each question, as well as the particular percentages reported. In general, the larger the sample sizes, the less likely a reported difference will be due to sampling error.

TABLE

47

DEMOGRAPHIC PROFILE OF SUPERMARKET SHOPPERS: 1991 (UNWEIGHTED) AND 1990 (WEIGHTED)

Base: The shopping public

	1991 Number Sample	1991 Unweighted Percentage Sample	1990 Weighted Percentage Sample
		%	%
Total	1,004	100	100
Sex			
Men	263	26	20
Women	741	74	80
Working	411	41	41
Nonworking	327	33	39
Type of Household			
With children	405	40	44
No children	596	59	56
Age			
18-24	77	8	7
25-39	348	35	38
40-49	212	21	20
50-64	220	22	18
65 and over	124	12	15
Income			
$15,000 or less	171	17	20
$15,001-$25,000	191	19	21
$25,001-$35,000	197	20	19
$35,001-$50,000	185	18	18
$50,001 or more	154	15	14
Marital status			
Single/separated/divorced/widowed	357	36	32
Married	646	64	68
Education			
High school or less	523	52	53
Some college/college grad	478	48	46
Medically restricted diet			
Yes	198	20	22
No	806	80	78
Region			
East	240	24	25
Midwest	290	29	28
South	317	32	33
West	157	16	15

East includes Connecticut, Delaware, District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont and West Virginia.

Midwest includes Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota and Wisconsin.

South includes Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas and Virginia.

West includes Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington and Wyoming.

Note: Percentages may add up to less than 100 percent as a result of nonresponse.

TABLE

48

SAMPLING ERROR (+/–) AT 95 PERCENT CONFIDENCE LEVEL FOR SAMPLES OF EIGHT DIFFERENT SIZES

Percentage Response	Size of Sample							
	1,000	700	600	500	400	300	200	100
	%	%	%	%	%	%	%	%
10(90)	1.9	2.2	2.4	2.6	2.9	3.4	4.2	5.9
20(80)	2.5	3.0	3.2	3.5	3.9	4.5	5.5	7.8
30(70)	2.8	3.4	3.7	4.0	4.5	5.2	6.4	9.0
40(60)	3.0	3.6	3.9	4.3	4.8	5.5	6.8	9.6
50(50)	3.1	3.7	4.0	4.4	4.9	5.7	6.9	9.8

In Table 49, the minimum percentage difference that must occur to be considered real is shown for varying sample sizes and varying percent responses.

In the previous example from Table 19, 405 respondents who live in households with children were asked how many times they go to the supermarket in an average week, of whom 24 percent said once. A total of 596 households without children were asked the same question, and 35 percent said they go once per week. These sample sizes are closest to the 400 and 500 sample size row of the table. The two percentages are closest to the 30 percent or 70 percent column. From the table, the minimum difference between percentages that would not be due to sampling error is six points. Because the difference between 24 percent and 35 percent exceeds this minimum, one can safely assume that fewer shoppers in households with children shop only once per week than those without children.

TABLE 49

SAMPLING ERROR OF DIFFERENCES AMONG PROPORTIONS

Sampling Tolerances (at 95% Confidence Level) to Use in Evaluating Differences Between Two Percentage Results

Approximate Sample Size of Two Groups Asked Question on Which Survey Results Are Based		Survey Percentage Results at 10% or 90%	Survey Percentage Results at 20% or 80%	Survey Percentage Results at 30% or 70%	Survey Percentage Results at 40% or 60%	Survey Percentage Results at 50%
1,000 vs.	1,000	3	4	4	4	4
	700	3	4	4	5	5
	500	3	4	5	5	5
	400	3	5	5	6	6
	300	4	5	6	6	6
	200	5	6	7	7	8
	100	6	8	9	10	10
700 vs.	700	3	4	5	5	5
	500	3	5	5	6	6
	400	4	5	6	6	6
	300	4	5	6	7	7
	200	5	6	7	8	8
	100	6	8	10	10	10
500 vs.	500	4	4	6	6	6
	400	4	5	6	6	7
	300	4	6	7	7	7
	200	6	7	8	8	8
	100	7	9	10	11	11
400 vs.	400	4	6	6	7	7
	300	4	6	7	7	7
	200	5	7	8	8	8
	100	7	9	10	11	11
300 vs.	300	5	6	7	8	8
	200	5	7	8	9	9
	100	7	9	10	11	11
200 vs.	200	6	8	9	10	10
	100	7	10	11	12	12
100 vs.	100	8	11	13	14	14

FMI Business Building Publications

If you need data, facts or background information about key food distribution issues, FMI's research publications may be just what you're looking for. Use the form on the following page to order today!

Consumer Research

How Consumers are Shopping the Supermarket — NEW!
This new study provides valuable data on consumer shopping patterns, including how shopping behavior varies by store size and how customers shop different departments of a supermarket.
Price: FMI Members: $15
Non-members: $30

The Service Advantage-1991: How Consumers Evaluate Service in Their Supermarket Experience — NEW!
This new report addresses consumer attitudes and expectations regarding service in supermarkets.
Price: FMI Members and
Non-members: $30

Consumer Attitudes Toward Supermarket Pharmacies — NEW!
This recent study focuses on the changing retail pharmacy environment, including consumer perceptions of the relationship between the pharmacy, health and beauty care products (HBC) and the overall store.
Price: FMI Members: $15
Non-members: $30

Trends: Consumer Attitudes & the Supermarket 1991
Price: FMI Members: $25
Non-members: $50

The Green Shopping Revolution: How Solid Waste Issues are Affecting Consumer Behavior
Consumer attitudes on food shopping and solid waste.
Price: FMI Members and
Non-members: $30

Dinnertime USA
How to cash in on the dining-at-home trend.
Price: FMI Members and
Non-members: $30

Targeting Food Customers
A comprehensive guide to using secondary research for the smaller or mid-size retailer.
Price: FMI Members: $15
Non-members: $30

Shopping a la Cart: The Changing Environment of the Takeout Food Market
A report that examines the attitudes and behaviors of takeout food customers.
Price: FMI Members: $15
Non-members: $30

Financial Studies

Operating Results of Independent Supermarkets
A managerial tool to help retailers evaluate store operating results.
Price: FMI Members: $25
Non-members: $50

Profitrak Software Package for Independent Operators — NEW!
This easy-to-use software package can calculate valuable profit ratios and productivity figures.
Price: FMI Members: $125
Non-members: $175

Annual Financial Review
Annual report for the supermarket industry.
Price: FMI Members: $15
Non-members: $30

Operations Review
Quarterly operations and productivity reports.
Price: FMI Members: $25
Non-members: $50

Industry Performance

Food Marketing Industry Speaks 1991
Summary of results from four different surveys: retail and distributon center, operations, energy and refrigeration issues and prepared foods.
Price: FMI Members: $20
Non-members: $40

Detailed Tablulations from "Food Marketing Industry Speaks 1991"
Detailed results from the "Speaks" surveys. Data are delineated by company size, geographic region and other measures as appropriate.
Price: (Includes "Speaks" report)
FMI Members: $25
Non-members: $50

Other Industry Studies

Micro-Merchandising: Targeted Consumer and Category Merchandising — NEW!
This new report defines micro-merchandising's value to food retailers and describes how micro-merchandising can be used as a valuable tool in developing successful consumer targeting strategies.
Price: FMI Members: $15
Non-members: $30

Front-End Electronic Marketing: Frequent Shopper and Other Programs — NEW!
A companion to *Perspectives on Electronic Marketing*, this primer focuses on marketing systems at the POS.
Price: FMI Members: $15
Non-members: $30

Perspectives on Electronic Marketing
First in a series of reports on implementing electronic marketing programs.
Price: FMI Members: $15
Non-members: $30

The Annual Business Planning Meeting
Practical suggestions and guidelines for developing an effective annual business meeting.
Price: FMI Members and
Non-members: $15

Facts About Store Development
This annual report examines new store costs and size, store formats, remodelings and rental and leasing arrangements.
Price: FMI Members: $15
Non-members: $30

Management Compensation Study for Wholesalers and Large Retailers
This annual study provides the benchmarks needed to properly administer compensation programs.
Price: FMI Members: $300
Non-members: $600

A specially priced package of THREE top research reports and an informative video.

State of the Food Industry '91

Four key resources to help you meet the challenges of the '90s.

- Trends: Consumer Attitudes & the Supermarket 1991
- The Food Marketing Industry Speaks 1991 *(Operational data)*
- Speaks Report '91 video *(Highlights of the '91 Convention workshop)*
- Facts About Store Development

Member Price: $85 (Save $25!)
Non-member Price: $170 (Save $50!)

Publications Order Form

	No. of Copies	Total Price
State of the Food Industry '91		
• *Trends, Speaks, Facts & Speaks Report '91 video* (9-532)	_____	$ _____
Consumer Research		
• Consumer Attitudes Toward Supermarket Pharmacies (18-841)	_____	$ _____
• Dinnertime USA (9-535)	_____	$ _____
• How Consumers are Shopping the Supermarket (9-511)	_____	$ _____
• The Green Shopping Revolution: How Solid Waste Issues Are Affecting Consumer Behavior (9-535)	_____	$ _____
• The Service Advantage — 1991: How Consumers Evaluate Service in Their Supermarket Experience (9-535)	_____	$ _____
• Shopping a la Cart — the Changing Environment of the Takeout Food Market (9-511)	_____	$ _____
• Targeting Food Customers (9-511)	_____	$ _____
• Trends: Consumer Attitudes & the Supermarket 1991 (9-536)	_____	$ _____
Financial Studies		
• Annual Financial Review (9-528)	_____	$ _____
• Operating Results of Independent Supermarkets (9-551)	_____	$ _____
• Operations Review (9-502)	_____	$ _____
• Profitrak Software Package for Independent Operators (9-551)	_____	$ _____
Industry Performance		
• Food Marketing Industry Speaks 1991 (9-503)	_____	$ _____
• Detailed Tabulations from "Food Marketing Industry Speaks 1991" (9-503)	_____	$ _____
Other Industry Studies		
• The Annual Business Planning Meeting (9-510)	_____	$ _____
• Facts About Store Development (9-504)	_____	$ _____
• Front-End Electronic Marketing: Frequent Shopper and Other Programs (9-511)	_____	$ _____
• Looking for Employees: A Recruitment and Retention Guide (9-511)	_____	$ _____
• Management Compensation Study for Wholesalers and Large Retailers (9-507)	_____	$ _____
• Micro-Merchandising: Targeted Consumer and Category Merchandising (9-511)	_____	$ _____
• Perspectives on Electronic Marketing (9-511)	_____	$ _____

Subtotal $ _____

Shipping & Handling
- Add 10% up to a maximum of $30
- International (air): add 20% of order up to a maximum of $75 $ _____

PAL
- Add $15 for international video $ _____

TOTAL DUE $ _____

Payment:

- Enclosed is my check for $ _____ (U.S. funds)
- VISA # _____
- MasterCard # _____
- American Express # _____

Expiration date _____

Signature _____

Please print:

Name _____

Title _____

Company _____

Street Address _____

City/State/ZIP _____

Phone _____ FAX _____

Send order form to:
Food Marketing Institute
1750 K Street, N.W.,
Washington, DC 20006-2394

Or FAX to: 202/429-4529

Or Call: 800/433-8200 or
202/452-8444

FIRST CLASS
U S Postage
PAID
Permit No 827
Washington, D C

PLEASE STAPLE

NO POSTAGE
NECESSARY
IF MAILED
IN THE
UNITED STATES

BUSINESS REPLY MAIL
FIRST CLASS PERMIT NO 11911 WASHINGTON, DC
POSTAGE WILL BE PAID BY ADDRESSEE

FOOD MARKETING INSTITUTE
1750 K Street, Northwest
Washington, D.C. 20006

FOOD MARKETING INSTITUTE

1750 K STREET, NW
WASHINGTON, DC 20006-2300
202/452-8444
FAX: 202/429-4519
TELEX: 892722 FMI USA WSH